



# Guide To Performance Management



*My***PURPOSE**

Grow. Learn. Lead. Serve.

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## Core Competencies for Employees

Competency	Description
Customer Service	Honors the organization's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service and information to external and internal customers.
Teamwork and Cooperation	Cooperates with others to accomplish common goals. Works with employees within and across his/her department to achieve shared goals. Treats others with dignity and respect and maintains a friendly demeanor. Values the contributions of others.
Accountability	Accepts full responsibility for self and contribution as a team member. Displays a strong commitment to organizational success. Demonstrates a commitment to delivering on his/her duties and responsibilities. Requests and uses leave in accordance with policies and procedures. Notifies supervisor directly if an unscheduled absence is necessary. Arrives at and leaves workstation per approved schedule. Observes rules concerning work schedules, breaks, and lunch periods.
Adaptability	Demonstrates ability to adjust readily to different conditions. Adjusts to change and different ways of doing things quickly and positively. Does not shy away from addressing setbacks or concerns. Deals effectively with a variety of people and situations. Appropriately modifies thinking or approach as the situation changes.
Communication	Respectfully listens to others to gain a full understanding of issues. Presents information in a clear and concise manner, orally and in writing, to ensure others understand his/her ideas. Appropriately adapts his/her message, style, and tone to accommodate a variety of audiences.
Professional Development	Demonstrates a commitment to professional development by proactively seeking opportunities to develop new capabilities, skills, and knowledge. Acquires the skills needed to continually enhance his/her contribution to the organization and to his/her respective profession.

## Leadership Competencies for Supervisors

Competency	Description
Team Leadership	Effectively manages and guides group efforts. Tracks team progress, adequately anticipates issues, and adjusts as needed to achieve team goals. Provides appropriate feedback concerning group and individual performance, including areas for improvement.
Change Management	Identifies, plans, implements, and supports changes that are aligned with the organization's vision and values. Develops innovative approaches to address problems. Leads continuous improvement in programs and processes. Leads effective and smooth change initiatives. Is a visible role model for others.
Talent Management	Clearly establishes and communicates expectations and accountabilities. Monitors and evaluates performance. Completes required performance evaluation system trainings, meetings, and documentation. Provides effective feedback and coaching. Identifies development needs and helps employees achieve optimal performance and gain valuable skills that will translate into strong performance.

## Goals

Goal Management is the process of creating and aligning individual performance goals to the organization's strategic objectives. Effective goal management ensures employees understand how their work contributes to the success of the Commonwealth. Performance goals help managers evaluate "what" the employee accomplished as part of the annual performance review.

## Rating Scale

The Year-End Interim/Final Performance Evaluation will be based on the following criteria.

Rating	Description
Unacceptable Performance	Employee rarely achieves expected performance and does not meet all or most of the performance expectations. Employee needs to improve performance significantly of job tasks or competencies.
Needs Improvement Performance	Employee inconsistently achieves expected performance and does not meet some performance expectations. Employee needs to improve performance of job tasks or competencies.
Satisfactory Performance	Employee meets performance expectations. Employee is a consistent contributor to the success of the organization.
Valued Performance	Employee exceeds some performance expectations. Employee is well regarded by peers and stakeholders.
Distinguished Performance	Employee often exceeds most performance expectations. Goals and tasks are accomplished above the required standards. Employee demonstrates a desire and ability to excel.
Exceptional Performance	Employee consistently exceeds all performance expectations. Performance represents an extraordinary level of achievement and commitment. Employee demonstrates role model behaviors.

## Tasks Step Progression

Annual Performance Plan	Mid-Year Interim Review	Year-End Interim/Final Performance Evaluation
<b>Review Step Progression</b> <ul style="list-style-type: none"> <li>✓ Evaluator Review ✓</li> <li>✓ Self Review ✓</li> <li>✓ Evaluator Goal Review Confirmation ✓</li> <li>✓ Next Line Supervisor Review ✓</li> <li>✓ Evaluator Discussion and Acknowledgment ✓</li> <li>✓ Employee Acknowledgment ✓</li> </ul>	<b>Review Step Progression</b> <ul style="list-style-type: none"> <li>✓ Self Review ✓</li> <li>✓ Evaluator Review ✓</li> <li>✓ Next Line Supervisor Review ✓</li> <li>✓ Evaluator Discussion and Acknowledgment ✓</li> <li>✓ Employee Acknowledgment ✓</li> </ul>	<b>Review Step Progression</b> <ul style="list-style-type: none"> <li>✓ Self Review ✓</li> <li>✓ Evaluator Review ✓</li> <li>✓ Evaluator Discussion and Acknowledgment ✓</li> <li>✓ Employee Acknowledgment ✓</li> <li>✓ Evaluator Rating ✓</li> <li>✓ Next Line Supervisor Review ✓</li> <li>✓ Evaluator Discussion and Acknowledgment ✓</li> <li>✓ Employee Acknowledgment ✓</li> </ul>

# Evaluator Annual Performance Planning

## Evaluator Review:

\*Note that the Evaluator Review is due ten (10) days after the task is launched.

1. From the MyPURPOSE home screen, select the Performance tile.



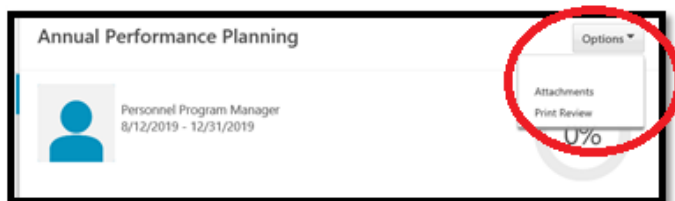
2. Select MyPerformance (Actions/Request).



3. You will have a separate task for each employee who is eligible for a performance plan and reports to you. Select **Launch** next to one of your Annual Performance Planning task.



4. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to the Performance Plan if desired.

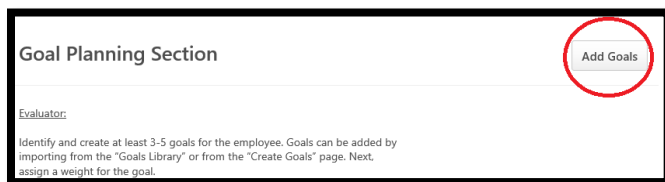


5. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.
6. **Competency Section**- Review the instructions for the Annual Performance Planning and scroll down to review the core competencies. You will notice for each competency you have the option to include comments for further explanation.

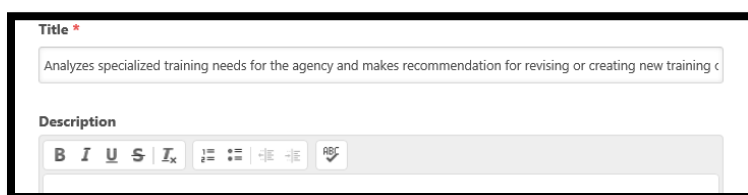
*For example, under Professional Development you may add a comment that says, “Employee is expected to complete 06 hours of training per year”.*

\*See the Core Competencies section for more information regarding competencies.

7. After you have reviewed all competencies and added any necessary comments, select **Save and Continue**.
8. **Goal Planning Section**- Review the instructions for the evaluator.
  - a. On the right hand side of your screen, select **Add Goals** to add 3-5 goals. Use one of the two methods listed below to add the employee's goals.

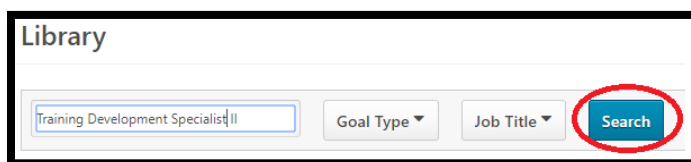


1. You can *manually* enter the goals by entering a goal into the title field. The description field is available to further define the goal, this is not required. OR see below on how to utilize the goals library.



2. For your convenience, we have created a *goals library* with a list of possible goals for all job titles. To utilize this feature, select **Library** located on the right hand side of your screen.

-Enter the employee's job title and select **Search**.

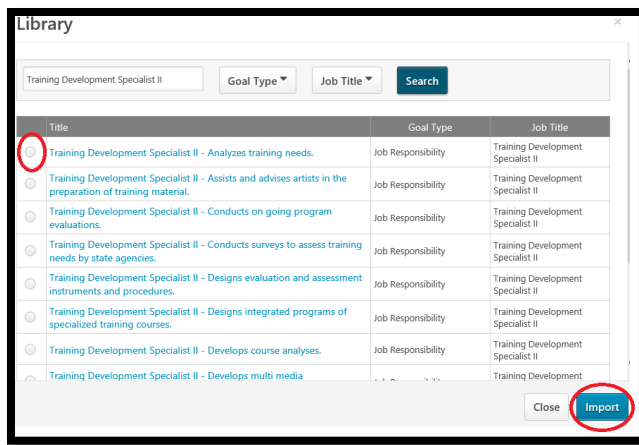


- Select the radio button next to a goal you wish to add, select **Import**.

\*Only one goal can be imported at a time.

\*Ensure you are selecting goals with a title that corresponds with the employee's job title.

\*Other duties as assigned is not a goal, this can be used as a task within a goal.



- Once imported, you may choose to remove the position title from the goal title.

-You may also update or add to the imported goal title and/or description.

- b. Verify each goal has a start and end date that matches the review period. For example, 01/01/2020 12/31/2020
- c. **Weight each goal.** The system will accept any percentage you enter, all goals should equal 100%.
- d. If you used the goals library, the goal type will default to Job Responsibility. If you entered the goal manually, use the drop down and select Job Responsibility.

Start Date: 1/1/2020  
End Date: 12/31/2020  
Weight: 20  
Goal Type: Job Responsibility  
Job Title: Training Development Spe...

- e. Each goal must have at least one task, you can add multiple tasks to a goal if applicable. Select **Add Tasks** and enter the task description, this should follow the SMART criteria and further define your goal.

\*SMART: Specific, Measurable, Achievable, Realistic, Timely

- f. Verify that your task start and end dates match the review period and then select **Done**.

For example, 01/01/2020 – 12/31/2020

Description: Conducts quarterly review on all agency training material and makes recommendations for revisions to leadership.

Start Date: 1/1/2020  
End Date: 12/31/2020

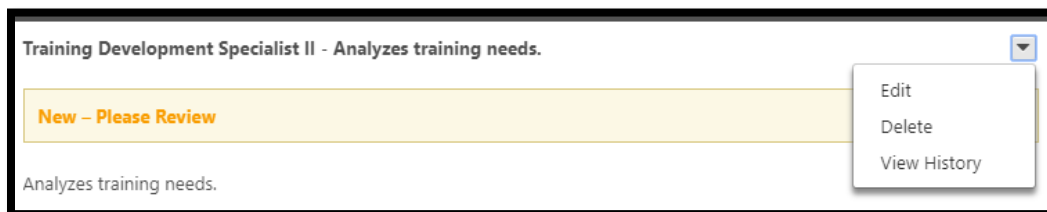
Cancel Done



g. From the Create goals page, review your goals and tasks and select **Save**.

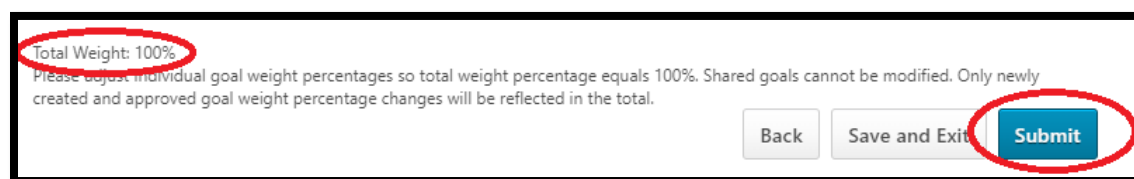
\*Repeat steps a-i until all goals and tasks have been added

h. From the goals page, you will see a yellow banner identifying all new goals. If you need to edit or delete a goal, use the drop down to view options for each goal.



9. Once the Goal Planning section has been completed with all goals and tasks, select **Submit**. You will receive a second submit notice, select **Submit**. This will automatically follow step progression and advance the plan to the employee for Self Review.

\* Note that total weight must reflect 100%, if not, you need to adjust your goal percentages before submitting. You can view the total weight at the bottom of the goals page.



### **Evaluator Goal Review Confirmation:**

\*Note that the Evaluator Goal Review Confirmation is due three (3) days after received.

1. Once the employee has completed the Self Review the task will automatically follow step progression and return to your Action items in MyPURPOSE, select **Launch**.



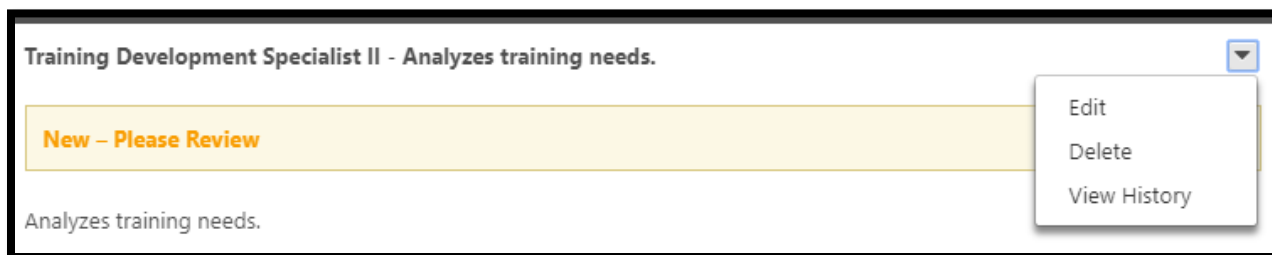
2. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.

\*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to a previous step.. If you utilize the reopen feature, please communicate with the individual and close task.

3. **Competency Section**- Review the instruction for the Annual Performance Planning and scroll down to review the core competencies. This section is read only, review and select **next**.

4. **Goal Planning Section**- Review the instructions for the evaluator. This section is intended for you to review any feedback the employee provided during their Self Review

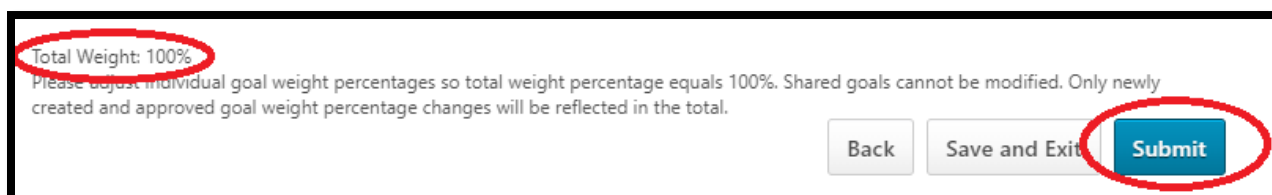
- a. Based on employee feedback, you can adjust goals/tasks by selecting the drop down on the right hand side of each goal and choose edit or delete.



- b. The comment box provided is optional and intended for you to respond to any feedback left by the employee.
- c. Once all goals/tasks have been reviewed, select **Submit**. Your task will automatically follow step progression and advance to the next line supervisor for review.

- Note that total weight **MUST** reflect 100%, if not you need to adjust your goal percentages before submitting.

- Once the task is complete, necessary goal modification must be completed from the My Goals page.



### **Evaluator Discussion and Acknowledgment:**

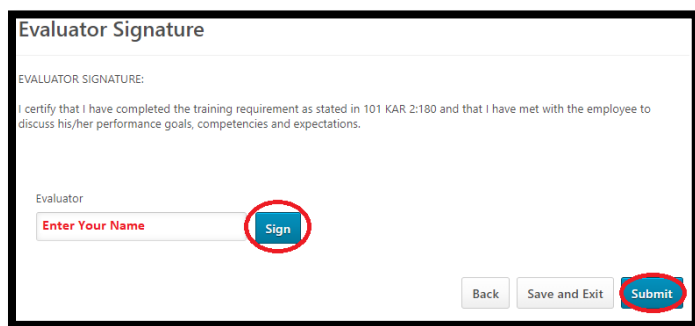
\*Note that the Evaluator Discussion and Acknowledgement is due five (5) days after received.

1. Once the next line supervisor has completed their review, the task will automatically follow step progression and return to your action items in MyPURPOSE, select **Launch**. This step is intended for the evaluator to meet/discuss the plan with the employee.



2. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.
3. **Competency Section**- Review the instructions for the Annual Performance Planning and scroll down to review the core competencies. Here you will be able to review all comments left by the employee and yourself. This section is read only, select **Next**.
4. **Goal Planning Section**- Review the instructions for the evaluator. Scroll down to review the goals and all comments left by the employee and yourself. This section is read only, select **Next**.

5. **Evaluator Signature Section-** To certify that you have completed all requirements and have met with your employee, enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the plan to the employee for acknowledgment.



The image shows a web form titled "Evaluator Signature". Below the title, it says "EVALUATOR SIGNATURE:". A paragraph of text reads: "I certify that I have completed the training requirement as stated in 101 KAR 2:180 and that I have met with the employee to discuss his/her performance goals, competencies and expectations." Below this text is a label "Evaluator" followed by a text input field containing the placeholder "Enter Your Name". To the right of the input field is a blue button labeled "Sign". At the bottom right of the form are three buttons: "Back", "Save and Exit", and a red button labeled "Submit".

## Evaluator Mid-Year Interim Review

### Evaluator Review:

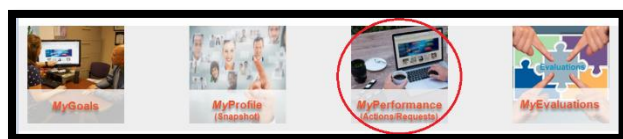
\*Note that the Evaluator Review is due ten (10) days after received.

\*Note this task launches to the employee. The first step in the Mid-Year Interim Review is the optional Self Review to be completed by the employee.

1. From the MyPURPOSE Home screen, select the Performance Tile.



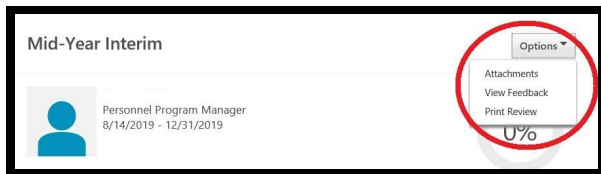
2. Select MyPerformance (Actions/Requests).




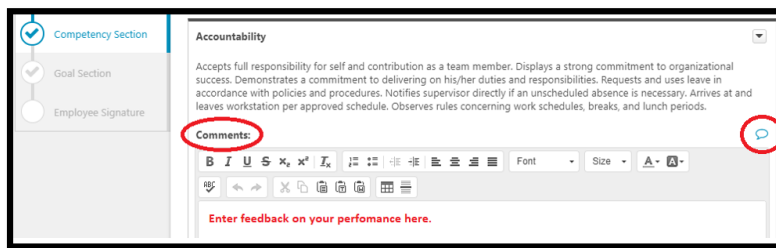
3. You will have a separate task for each employee who is eligible for a Mid-Year Interim Review and reports to you. Select **Launch** next to one of your Mid-Year tasks.



4. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to the Mid-Year Interim Review if desired.



5. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.  
 \*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to a previous step. If you utilize the reopen feature, please communicate with the individual and close task.
6. **Competency Section-** Review the instructions for the Mid-Year Interim Review and scroll down to review the core competencies. You will be able to review any comments left by the employee during their Self Review.
  - a. Comments are required from you, the evaluator, on all competencies listed.
  - b. To the right of the comments box, we have included suggested comments for your convenience. To utilize this feature select the  icon and select the comment you wish to utilize.



7. After you have reviewed and commented on each competency, select **Save and Continue**.
8. **Goal Section-** Review the instructions for the evaluator and scroll down to view any comments left by the employee during their Self Review.
  - a. Comments are required from you, the evaluator, on all goals listed.
  - b. Once all goals have been commented on, select **Submit**. The task will automatically follow step progression and advance to the Next Line Supervisor Review

### **Evaluator Discussion and Acknowledgment:**

\*Note that the Evaluator Discussion and Acknowledgment is due five (5) days after received.

1. Once the next line supervisor has completed their review, the task will return to your Action items in MyPURPOSE, select **Launch**. This step is intended for the manager to meet/discuss the Mid-Year Interim Review with the employee.



2. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.  
 \*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the

task to a previous step. If you utilize the reopen feature, please communicate with the individual and close task.

3. **Competency Section**- Review the instructions for the Mid-Year Interim and scroll down to review the core competencies. This section is read only, comments from the employee and yourself are visible. Select **Next**.
4. **Goal Section**- Review the instructions for the evaluator and scroll down to review the goals. This section is read only, comments from the employee and yourself are visible. Select **Next**.
5. **Evaluator Signature section**- To certify that you have completed all requirements and have met with your employee, enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advances the Mid-Year Interim Review to the employee for acknowledgment.

## Evaluator Year-End Interim/Final Performance Evaluation

### Evaluator Review for Year-End Interim Review:

\*Note this task launches to the employee for an optional Self Review. The Evaluator Review is due five (5) days after received.

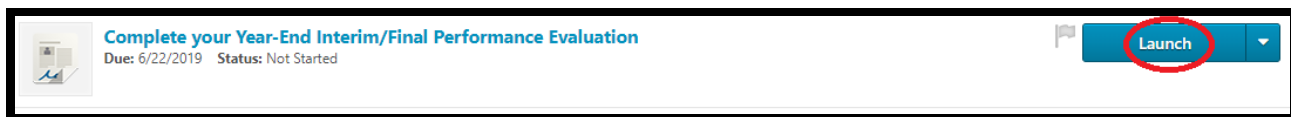
1. From the MyPURPOSE Home screen, select the Performance Tile.



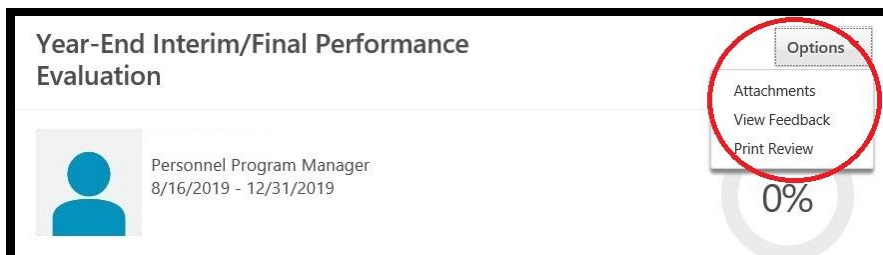
2. Select MyPerformance (Actions/Requests).




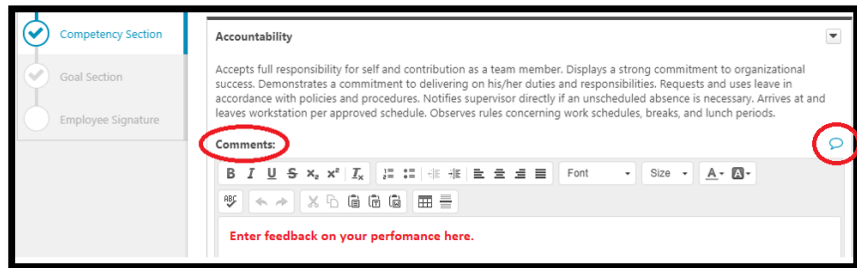
3. Select **Launch** next the employee's Year-End Interim/Final Performance Evaluation, you will have separate task for each employee.



4. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to the Year End Interim Review if desired.



5. Each task will start with an overview, please read the Year-End Interim/Final Performance Evaluation overview carefully and select **Get Started**.  
 \*You will notice beside get started you have a **Reopen Step** option. Use this if you need to return the task to a previous step. If you utilize the reopen feature, please communicate with the individual and close task.
6. **Competency Section-** Review the instruction for the Year End Interim and scroll down to review the core competencies. You will be able to review any comments left by the employee during their Self Review.
  - a. Comments are required from you, the evaluator, on all competencies listed.
  - b. To the right of the comments box, we have included suggested comments for your convenience. To utilize this feature select the  icon and select the comment you wish to utilize.



7. After you have reviewed and commented on each competency, select **Save and Continue**.
8. **Goal Section-** Review the instructions for the evaluator and scroll down to view any comments left by the employee during their Self Review.
  - a. Comments are required from you, the evaluator, on all goals listed.
9. After you have commented on each goal, select **Save and Continue**.

\*Be mindful to select **Save and Continue** and not blue **Submit** option. Submit will automatically advance the task to the employee.

10. **Summary section-** This screen is blank as there are no ratings associated with the Year-End Interim Review, select **Submit**. The task will automatically follow step progression and the Year-End Interim Review will route back to you for discussion and acknowledgment with the employee.

The screenshot shows a web application interface for the 'Summary' section. On the left is a sidebar with a 'Summary' tab selected and a 'Year End/Interim/Final ...' tab below it. The main content area is titled 'Summary' and contains a table with two columns: 'Competency Section', 'Goal Section', and 'Overall' on the left, and 'Evaluator Rating' on the right. The table is currently empty. At the bottom right of the main area are 'Back' and 'Submit' buttons.

### **Evaluator Discussion and Acknowledgment for Year-End Interim Review:**

\*Note that the Discussion and Acknowledgment is due four (4) days after receiving.

1. Once the Year-End Interim has been reviewed and the employee and yourself have commented on both the competencies and goals, the task will return to your Action items in MyPURPOSE, select **Launch**. This step is intended for the evaluator to meet/discuss the Year End Interim with the employee.
2. Each task will start with an overview, please read the Year-End Interim overview carefully and select **Get Started**.

\*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to a previous step. If you utilize the reopen feature, please communicate with the individual and close task.

3. **Competency Section**-Review the instructions for the Year-End Interim and scroll down to review the core competencies. Here you will be able to review all comments left by the employee and yourself. This section is read only, select **Next**.
4. **Goal Section**- Review the instruction for the evaluator and scroll down to review the goals. Here you will be able to review all comments left by the employee and yourself. This section is read only, select **Next**.
5. **Summary Section**- This screen is blank as there are no ratings associated with the Year-End Interim, select **Next**.
6. **Evaluator Signature Section**- To certify that you have completed all requirements and have met with your employee, enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the Year-End Interim to the employee for acknowledgment.

The screenshot shows the 'Evaluator Signature' section. The sidebar has 'Evaluator Signature' selected. The main content area is titled 'Evaluator Signature' and contains a text box for the evaluator's signature. Below the text box is a 'Sign' button. At the bottom of the main area are 'Back', 'Save and Exit', and 'Submit' buttons.

\*This is the final step for the evaluator for the Year-End Interim Review\*



## **Evaluator Rating for Final Performance Evaluation:**

\*Note that this is due three (3) days after received.

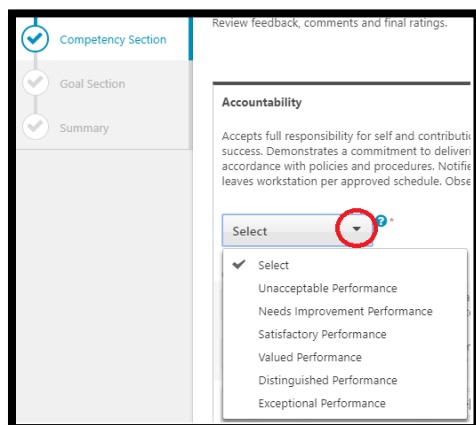
1. Select **Launch** next the employee's Year-End Interim/Final Performance Evaluation, you will have separate task for each employee.



2. Each task will start with an overview, please read the Year-End Interim/Final Performance Evaluation overview carefully and select **Get Started**.

\*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to a previous step. If you utilize the reopen feature, please communicate with the individual and close task.

3. **Evaluator Signature Section**- This screen is simply to show that the Year-End Interim has been completed, select **Save and Continue**.
4. **Competency Section**- Review the instructions for the Final Performance Evaluation and scroll down to review the core competencies.
  - a. Below each competency listed, you will see a dropdown labeled **Select**. Use the dropdown to select a rating for each competency.



- b. You can select the help icon to the right of the dropdown to display a description of all ratings. DO NOT COMMENT, only apply rating.



5. After you have selected a rating for each competency, select **Save and Continue**.
6. **Goal Section**- Review the instructions for the Final Performance Evaluation and scroll down to review all goals and tasks.



- a. Below each goal listed, you will see a dropdown labeled **Select**. Use the dropdown to select a rating for each goal.

Training Development Specialist II - Analyzes

Analyzes training needs.

Status: Approved  
Start Date: 1/1/2019  
End Date: 12/31/2019  
[more...](#)

Weight: 100 %

Select

- ✓ Select
- Unacceptable Performance
- Needs Improvement Performance
- Satisfactory Performance
- Valued Performance
- Distinguished Performance
- Exceptional Performance

- b. You can select the help icon to the right of the dropdown to display a description of all ratings. DO NOT COMMENT, only apply rating.

7. After you have selected a rating for each goal, select **Save and Continue**.

\*Be mindful to select Save and Continue and not blue Submit option. Submit will automatically advance the task to the employee.

8. **Summary Section**- This screen provides you with the employee's overall rating, as well as a rating for the competencies and goals sections, select **Submit**. This will automatically follow step progression and advance the Final Performance Evaluation to the next line supervisor for review.

Summary

Overall Rating  
Valued Performance

	Evaluator Rating
Competency Section	Valued Performance
Goal Section	Valued Performance
Overall	Valued Performance

Back Submit

## **Evaluator Discussion and Acknowledgment Step for Final Performance Evaluation:**

Note that Evaluator Discussion and Acknowledgment is due five (5) days after received.

1. Once the Final Performance Evaluation has been reviewed by the next line supervisor, the task will return to your action items in MyPURPOSE, select **Launch**. This step is intended for the evaluator to meet/discuss the Final Performance Evaluation with the employee.

Each task will start with an overview, please read the Year-End Interim/Final Performance Evaluation overview carefully and select **Get Started**.

\*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to a previous step. If you utilize the reopen feature, please communicate with the individual and close task.

2. **Competency Section**-Review the instructions for the Final Performance Evaluation and scroll down to review the core competencies. Here you will be able to review all comments left by the employee and yourself. This section is read only, select **Next**.
3. **Goal Section**- Review the instruction for the evaluator. Scroll down to review the goals. Here you will be able to review all comments left by the employee and yourself. This section is read only, select **Next**.
4. **Summary Section**- This screen provides you with the employee's overall rating, as well as a rating for the employee's competencies and goals Sections, select **Next**.

The screenshot shows the 'Summary' section of the Final Performance Evaluation. On the left is a sidebar with a 'Summary' tab. The main content area is titled 'Summary' and displays 'Overall Rating' and 'Valued Performance'. Below this is a table with two columns: 'Competency Section', 'Goal Section', and 'Overall' on the left, and 'Evaluator Rating' on the right. Each row in the table shows 'Valued Performance' in the 'Evaluator Rating' column. At the bottom right of the table are 'Back' and 'Submit' buttons, with the 'Submit' button circled in red.

	Evaluator Rating
Competency Section	Valued Performance
Goal Section	Valued Performance
Overall	Valued Performance

5. **Evaluator Signature Section**- To certify that you have completed all requirements and have met with your employee enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the Final Performance Evaluation to the employee for acknowledgment.

The screenshot shows the 'Evaluator Signature' section. On the left is a sidebar with an 'Evaluator Signature' tab. The main content area is titled 'Evaluator Signature' and contains the text: 'EVALUATOR SIGNATURE: I certify that I have completed the training requirement as stated in 101 KAR 2:180 and that I have met with the employee to discuss his/her performance goals, competencies and expectations.' Below this text is a form with a label 'Evaluator' and a text input field containing 'Enter Your Name'. To the right of the input field is a 'Sign' button circled in red. At the bottom right of the form are 'Back', 'Save and Exit', and 'Submit' buttons, with the 'Submit' button circled in red.

# Employee Annual Performance Planning

## Self Review:

\*The employee Self Review is optional. If the employee chooses to take no action, the task will advance to the evaluator in five (5) days.

1. From the MyPURPOSE Home screen, select the Performance Tile.



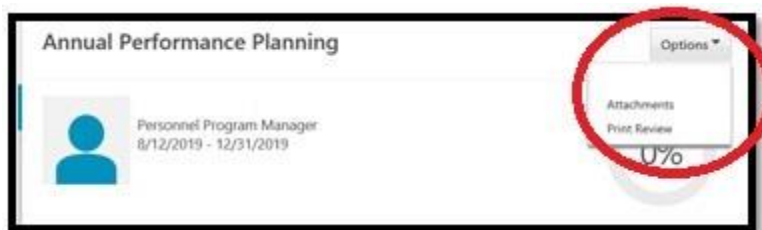
2. Select MyPerformance (Actions/Request).



3. You will have a task labeled Complete your Annual Performance Planning, select **Launch**.



4. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.
5. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to the Annual Performance Plan if desired.

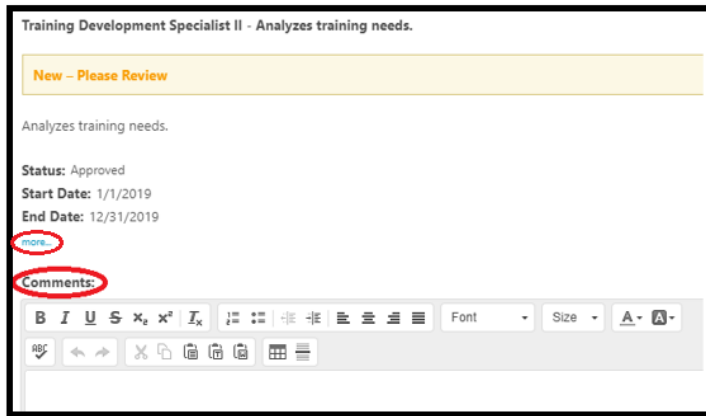


6. **Competency Section**- Review the instructions for the Annual Performance Planning and scroll down to review your core competencies. Select **Save and Continue**.

\*You do not have the option to add comments to the competency section of your plan.

7. **Goal Planning**- Review the instruction for the employee.

8. From the goals page you will see a yellow banner identifying all goals added by the evaluator to review.
  - a. Select the more button to see the tasks associated with each goal.
  - b. The comment box provided is optional and intended for you to provide any feedback to your evaluator about your new goal.



- c. Once all goals and tasks have been reviewed, select **Submit**. You will receive a second submit notice, select **Submit**. This will automatically follow step progression and advance to the evaluator for Goal Review Confirmation.

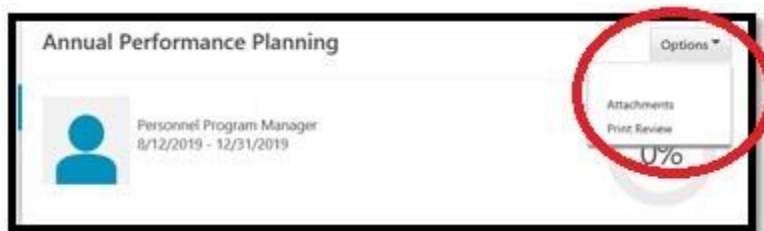
### **Employee Acknowledgment:**

\*Note that the Employee Acknowledgment is due three (3) days after received.

1. Once you and your evaluator have met and completed the Discussion and Acknowledgment step, the Annual Performance Plan will automatically follow step progression and return to your Action items in MyPURPOSE, select **Launch**.



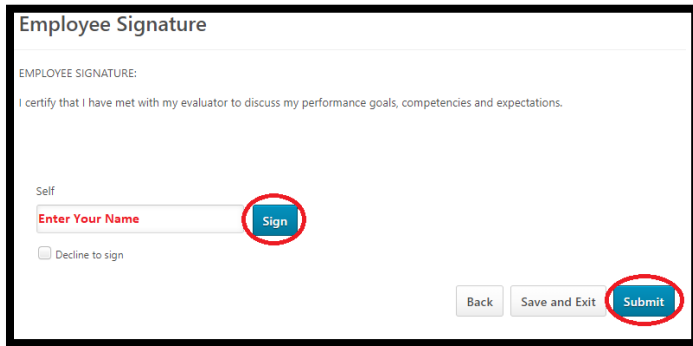
2. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to the Annual Performance Plan if desired.



3. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.

4. **Competency Section**- Review the instructions for the Annual Performance Planning and scroll down to review the core competencies and all comments left by your evaluator. This section is read only, select **Next**.
5. **Goal Section**- Review the instructions for the employee and scroll down to review your goals and all comments left by your evaluator, next line supervisor and yourself. This section is read only, select **Next**.
6. **Employee Signature Section**- To certify that you have met with your evaluator and discussed your goals, competencies and expectations, enter your name and select **Sign** then select **Submit**.

\*Note, if the employee chooses to select “Decline To Sign”, the task must still be completed by selecting **Submit**.



The screenshot shows a web form titled "Employee Signature". Below the title, it says "EMPLOYEE SIGNATURE:" and "I certify that I have met with my evaluator to discuss my performance goals, competencies and expectations." There is a section labeled "Self" with a text input field containing the placeholder "Enter Your Name" and a blue "Sign" button next to it. Below this is a checkbox labeled "Decline to sign". At the bottom right, there are three buttons: "Back", "Save and Exit", and a blue "Submit" button. Red circles are drawn around the "Sign" button and the "Submit" button.

***The Annual Plan is now complete!***

## Employee Mid-Year Interim

### Self Review:

\* The employee Self Review is optional. If the employee chooses to take no action, the task will advance to the evaluator in five (5) days.

1. From the MyPURPOSE Home screen, select the Performance Tile.



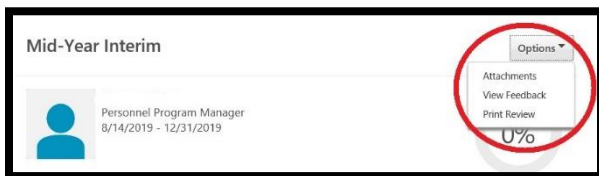
2. Select MyPerformance (Actions/Request).



3. Select **Launch** to Complete your Mid-Year Interim Review. Please note that once the action has been assigned to you, you have five (5) days to review or it will automatically route to your evaluator.

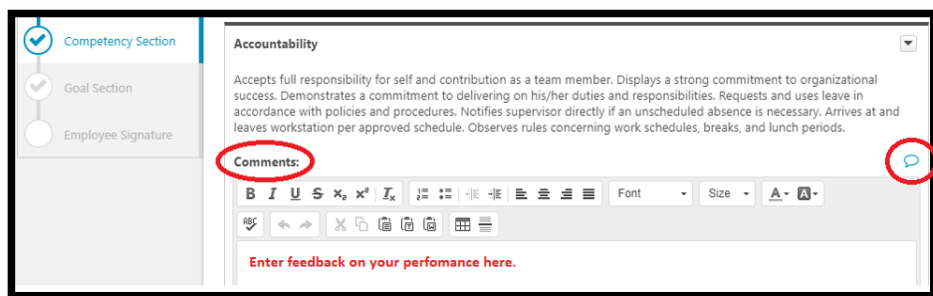


4. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to your Mid-Year Interim Review if desired.

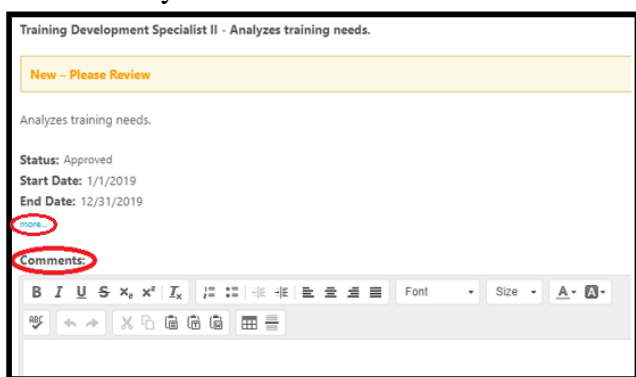


5. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.
6. **Competency Section**- Review the instructions for the Mid-Year Interim Review and scroll down to review your core competencies.

- a. You have the option to include comments on each competency listed, we strongly encourage you to provide feedback to your evaluator.



7. After you have reviewed and commented on all competencies, select **Save and Continue**.
8. **Goal Section**- Review the instruction for the employee.
9. From the Goals page, review your goals.
  - a. Select the more button to see the tasks and percentages assigned to each goal.
  - b. You have the option to include comments on each goal listed, we strongly encourage you to provide feedback to your evaluator.



- c. Once all goals have been reviewed and you have left comments, select **Submit**.
- d. Your task will automatically follow step progression and advance to the evaluator for review.

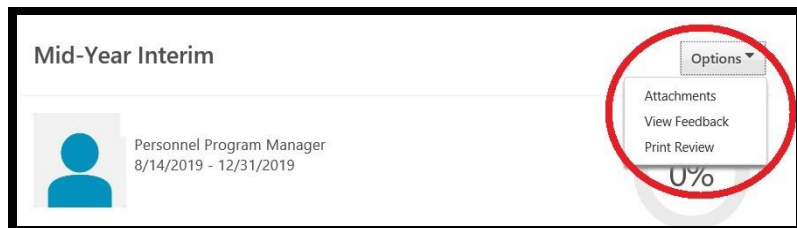
### **Employee Acknowledgment:**

\*Note that the Employee Acknowledgment is due Five (5) days after received

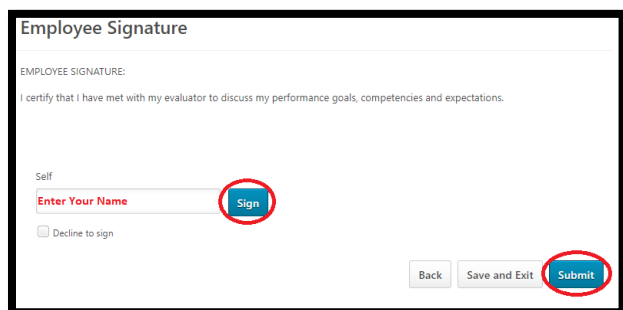
1. Once you and your evaluator have completed the Discussion and Acknowledgment step for the Mid-Year Interim Review, the task will return to your Action items in MyPURPOSE, select **Launch**.



2. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to the Mid-Year Interim Review if desired.



3. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.
4. **Competency Section**- Review the instructions for the Mid-Year Interim Review and scroll down to review the core competencies. This section is read only, comments from the evaluator and yourself are visible, select **Next**.
5. **Goal Section**- Review the instructions for the employee and scroll down to review your goals and all comments left by your evaluator and yourself. This section is read only, select **Next**.
6. **Employee Signature Section**- If you certify that you have met with your evaluator and discussed your goals, competencies and expectations, enter your name and select **Sign** then select **Submit**.



\*Note, if the employee chooses to select “Decline To Sign”, the task must still be completed by selecting **Submit**.

***Mid-Year Interim Review is now complete!***



# Employee Year End Interim/Final Performance Evaluation

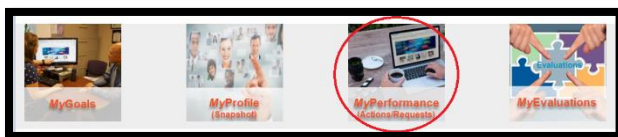
## Self Review:

\* The employee Self Review is optional. If the employee chooses to take no action, the task will advance to the evaluator in five (5) days.

1. From the MyPURPOSE Home screen, select the Performance Tile.



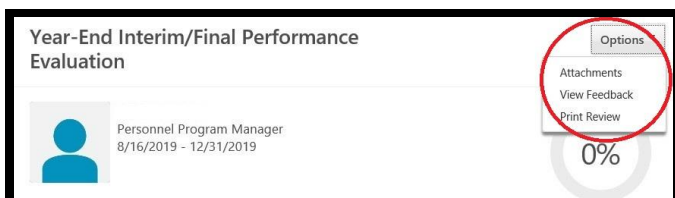
2. Select MyPerformance (Actions/Request).



3. Select **Launch** next to Complete your Year-End Interim/Final Performance Evaluation.



4. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to your Year-End Interim or review any feedback given through the year.



5. Each task will start with an overview, please read the Year-End Interim overview carefully and select **Get Started**.
6. **Competency Section**- Review the instructions for the Year-End Interim and scroll down to review the core competencies.

- a. You have the option to include comments on each competency listed, we strongly encourage you to provide feedback to your evaluator.

7. After you have reviewed and commented on all competencies, select **Save and Continue**.
8. **Goal Section**- Review the instructions for the employee and scroll down to review your goals.
  - a. You have the option to include comments on each goal listed, we strongly encourage you to provide feedback to your evaluator.

After you have reviewed and commented on all goals, select **Save and Continue**.

\*Be mindful to select **Save and Continue** and not the blue **Submit** option. Submit will automatically advance the task to the evaluator.

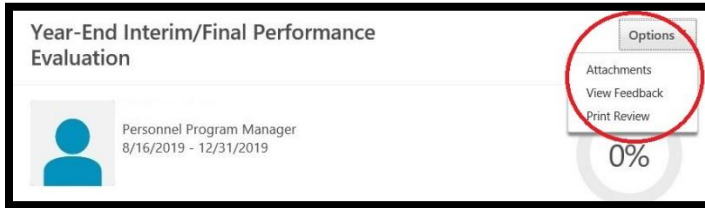
9. **Summary Section**- This screen is blank as there are no ratings associated with the Year-End Interim, select **Submit**. This will automatically follow step progression and advanced the task to your evaluator for review.

### **Employee Acknowledgment:**

\*Note that the Employee Acknowledgment is due two (2) days after received.

1. Once you and your evaluator have completed the Discussion and Acknowledgment section, the Year-End Interim/Final Performance Evaluation task will return to your Action items in MyPURPOSE, select **Launch**.

2. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to the Year-End Interim/Final Performance Evaluation if desired.



3. Each task will start with an overview, please read the Year-End Interim overview carefully and select **Get Started**.
4. **Competency Section**- Review the instructions for the Year-End Interim and scroll down to review the core competencies. Here you will be able to review all comments left by your evaluator and yourself. This section is read only, select **Next**.
5. **Goal Section**- Review the instructions for the employee and scroll down to review your goals and tasks. Here you will be able to review all comments left by your evaluator and yourself. This section is read only, select **Next**.
6. **Summary Section**- This screen is blank as there are no ratings associated with the Year-End Interim, select **Next**.
7. **Employee Signature Section**- If you certify that you have met with your evaluator and discussed your goals, competencies and expectations, enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the Year-End Interim/Final Performance Evaluation to your evaluator to apply the final ratings.

\*Note, if the employee chooses to select “Decline To Sign”, the task must still be completed by selecting **Submit**.

### **Employee Acknowledgment:**

\*Note that the Employee Acknowledgment is due two (2) days after received.

1. **Competency Section**-Review the instructions for the Final Performance Evaluation and scroll down to review the core competencies. Here you will be able to review all comments left by the evaluator and yourself. This section is read only, select **Next**.

2. **Goal Section**- Review the instruction for the Final Performance Evaluation and scroll down to review the goals. Here you will be able to review all comments left by the evaluator and yourself. This section is read only, select **Next**.
3. **Summary Section**- This screen provides you with your overall rating, as well as a rating for your competencies and goals, select **Next**.

The screenshot shows the 'Summary' section of a performance evaluation form. On the left is a sidebar with a 'Summary' tab. The main content area is titled 'Summary' and contains the following information:

- Overall Rating
- Valued Performance
- A table with two columns: 'Competency Section' and 'Evaluator Rating'. The table contains three rows: 'Competency Section', 'Goal Section', and 'Overall'. Each row has a 'Valued Performance' link in the 'Evaluator Rating' column.

At the bottom right of the main content area are two buttons: 'Back' and 'Submit'. The 'Submit' button is circled in red.

4. **Employee Signature Section**- To certify that you have have met with your evaluator, enter your name and select **Sign** then select **Submit**.

\*Note, if the employee chooses to select “Decline To Sign”, the task must still be completed by selecting **Submit**.

The screenshot shows the 'Employee Signature' section of a performance evaluation form. The title is 'Employee Signature'. Below the title is a section labeled 'EMPLOYEE SIGNATURE:' with the text 'I certify that I have met with my evaluator to discuss my performance goals, competencies and expectations.' Below this is a 'Self' section with a text input field labeled 'Enter Your Name' and a 'Sign' button. The 'Sign' button is circled in red. Below the input field is a checkbox labeled 'Decline to sign'. At the bottom right of the form are three buttons: 'Back', 'Save and Exit', and 'Submit'. The 'Submit' button is circled in red.

***The Final Performance Evaluation is Completed***

## Next Line Supervisor Performance Planning Review

\*Note that the Next Line Supervisor Review is due five (5) days after received.

1. From the MyPURPOSE Home screen, select the Performance Tile.



2. Select MyPerformance (Actions/Request).



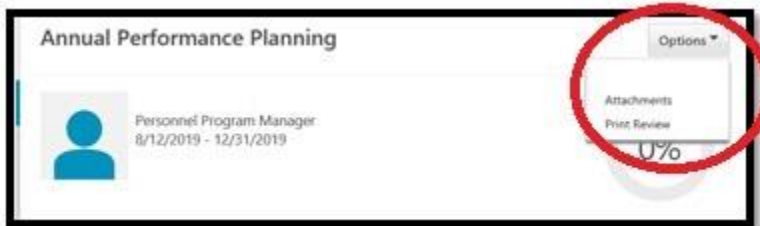
3. Select **Launch** next to your Next-Line Supervisor Annual Performance Planning task, you will have separate task for each employee.



4. Each task will start with an overview, please read the Annual Performance Planning overview carefully and select **Get Started**.

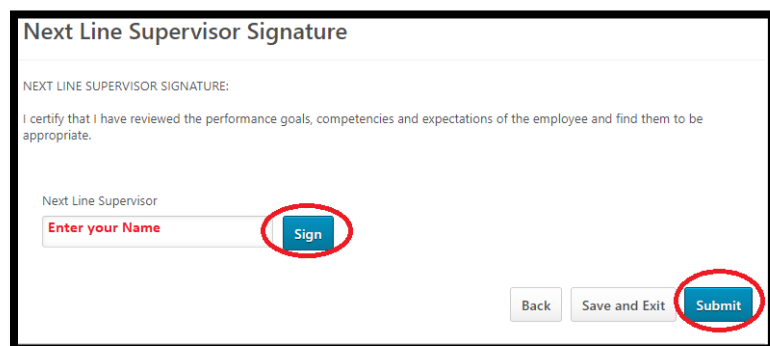
\*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to a previous step. If you utilize the reopen feature, please communicate with the individual and close task

5. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to the Performance Plan if desired.



6. **Competency Section**- Review the instruction for the Annual Performance Planning and scroll down to review the core competencies. This section is read only, review and select **Save and Continue**.
7. **Goal Planning Section** – Review the instructions and scroll to review the employee goals. This section is read only, comments from employee and evaluator will be visible. Select **Save and Continue**.

8. **Next Line Supervisor Signature Section-** Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the plan back to the evaluator for the evaluator/employee discussion meeting and acknowledgment steps.



### **Next Line Supervisor Mid-Year Interim Review:**

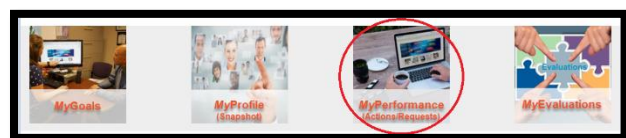
\*Note that the Next Line Supervisor Review is optional. If no action is taken, the task will advance to the evaluator in five (5) days.

The next line supervisor Mid-Year Interim Review is optional. If the next line supervisors chooses not to review the Mid-Year, the task will automatically advance to the evaluator for employee discussion.

1. From the MyPURPOSE Home screen, select the Performance Tile.



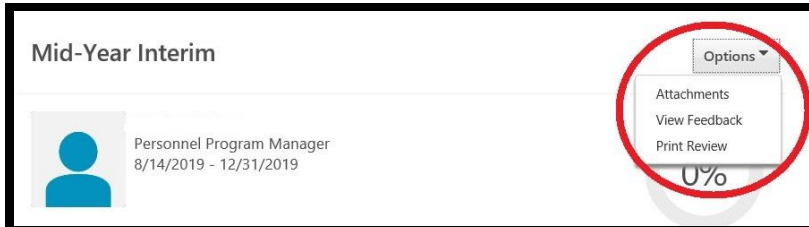
2. Select MyPerformance (Actions/Request).



3. You will have a separate task for each employee. Select **Launch** next to the next line supervisor Mid-Year Interim Review task.



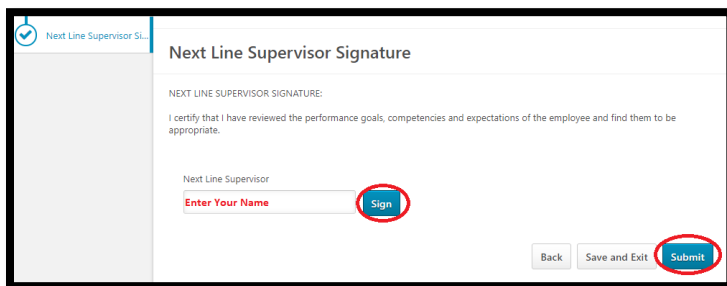
4. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to add an attachment to the Mid-Year Interim Review if desired.



5. Each task will start with an overview, please read the Mid-Year Interim Review overview carefully and select **Get Started**.

\*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to a previous step. If you utilize the reopen feature, please communicate with the individual and close task.

6. **Competency Section**- Review the instruction for the Mid-Year Interim Review and scroll down to review the core competencies. This section is read only, comments from employee and evaluator are visible. Select **Save and Continue**.
7. **Goal Section** – Review the instructions and scroll down to review the employee goals. This section is read only, comments from employee and evaluator are visible. Select **Save and Continue**.
8. **Next Line Supervisor Signature Section**- Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the task back to the evaluator for evaluator/employee discussion meeting and acknowledgment steps.





## Next Line Supervisor Year End Interim/Final Performance Evaluation

\*Note that the Next Line Supervisor Review is due five (5) days after received.

1. From the MyPURPOSE Home screen, select the Performance Tile.



2. Select MyPerformance (Actions/Request).



3. Select **Launch** next to next line supervisor Year-End Interim/Final Performance Evaluation, you will have separate tasks for each employee.



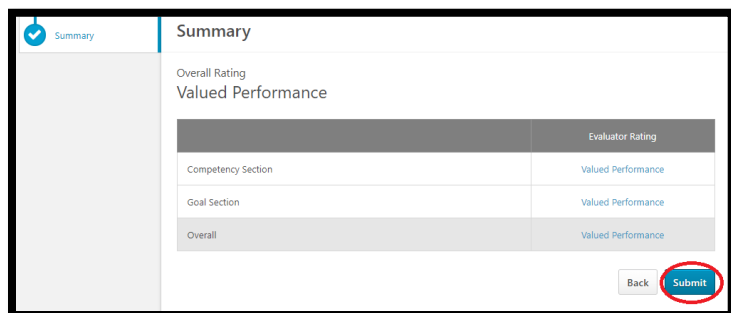
4. Each task will start with an overview, please read the Year-End Interim/Final Performance Evaluation overview carefully and select **Get Started**.

\*You will notice beside Get Started you have a **Reopen Step** option. Use this if you need to return the task to a previous step. If you utilize the reopen feature, please communicate with the individual and close task.

5. **Competency Section**- Review the instruction for the Year-End Interim/Final Performance evaluation and scroll down to review the core competencies. This section is read only, comments from employee and evaluator are visible. Select **Save and Continue**.
6. **Goal Section** – Review the instructions and scroll down to review the employee goals. This section is read only, comments from employee and evaluator will be visible. Select **Save and Continue**.



7. **Summary Section-** This screen provides you with the employee's overall rating as well as a rating for the competency and goal section select **Next**.

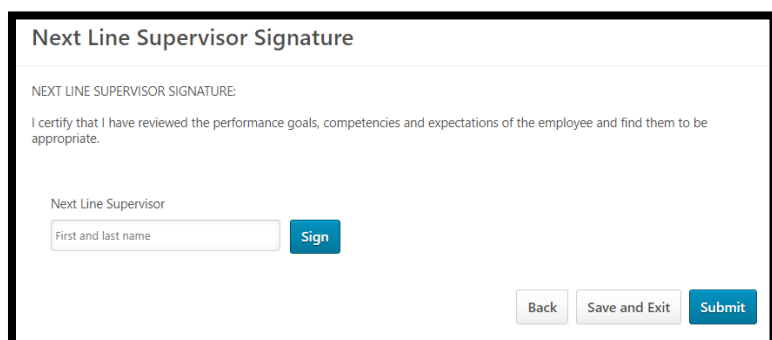


The screenshot shows a web interface titled "Summary". On the left is a sidebar with a "Summary" link and a checkmark icon. The main content area displays "Overall Rating" and "Valued Performance". Below this is a table with two columns: the first column lists sections, and the second column shows the "Evaluator Rating".

	Evaluator Rating
Competency Section	Valued Performance
Goal Section	Valued Performance
Overall	Valued Performance

At the bottom right of the main content area, there are two buttons: "Back" and "Submit". The "Submit" button is highlighted with a red circle.

8. **Next Line Supervisor Signature Section-** Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the plan back to the evaluator for evaluator/employee discussion meeting and acknowledgment steps.



The screenshot shows a web interface titled "Next Line Supervisor Signature". Below the title, it says "NEXT LINE SUPERVISOR SIGNATURE:". A certification statement follows: "I certify that I have reviewed the performance goals, competencies and expectations of the employee and find them to be appropriate."

Below the statement, there is a label "Next Line Supervisor" and a text input field with the placeholder "First and last name". To the right of the input field is a blue button labeled "Sign".

At the bottom of the form, there are three buttons: "Back", "Save and Exit", and "Submit".

## Off Cycles:

### New Performance Plan

If an employee's position or job title changes during the review period, the evaluator must create a new Annual Performance Plan no later than thirty (30) calendar days after the start date of the change.

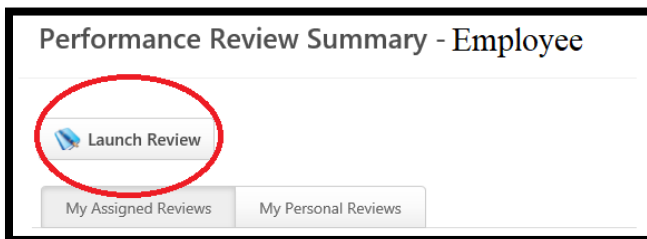
1. From the MyPURPOSE home screen, select the Performance tile.



2. Select MyEvaluations.



3. From the Performance review screen, select **Launch Review**.



4. From the Launch Performance Summary Review screen enter the following information and select **Launch**.
  - a. Who is the review for? Select, **Someone else**

- b. Click **User**. Here you can search by employee's name, User ID or your last name. Select **Search** and choose the employee's name you wish to launch an Annual Performance Plan.

Select User

Search is limited to 1000 records only

Last Name First Name ID User Name Manager's Last Name

Search

Name	User ID	User Name	Manager
(1 Result)			

- c. Select **Review Form** and choose **New Position Performance Planning**.

Select Review Form

Review Form: Search

Review Form	Description
New Position Performance Planning	New Position Performance Planning
Performance Improvement Plan	Performance Improvement Plan

- d. Enter a title for the review. Example: New Position Performance Plan for (employee name)

- e. Enter the current Review period, employee's start date to the end of the year.

Launch Performance Review

a. Who is this review for? ☐ Me ☒ Someone else User b.

c. Which review form would you like to use? New Position Performance Planning x

d. Task Name Here

Expiration Date: 30 days

e. What is the review period? From: To:

New Position Performance Planning

Description: New Position Performance Planning

Workflow:

New Position Performance Planning

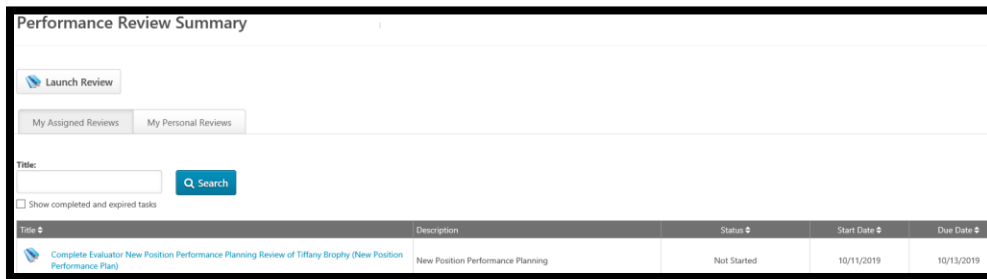
Description: New Position Performance Planning

Workflow:

Evaluator Review → Self Review → Evaluator Goal Review Confirmation → Next Line Supervisor Review → Evaluator Discussion Acknowledgment

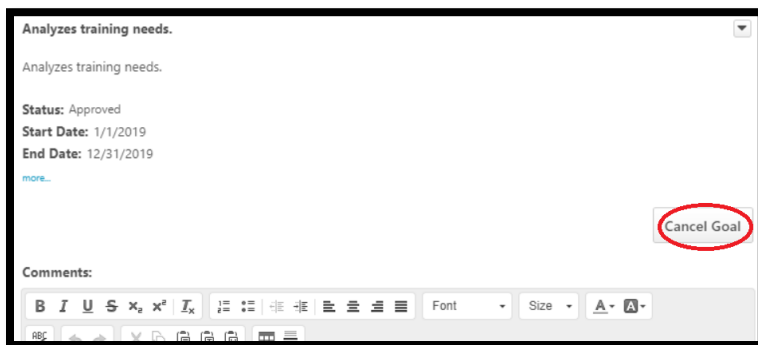
Cancel Launch

5. The New Position Performance Planning Review task will appear in your Performance Review Summary page or as a task in your Actions. From the Performance Review Summary page, select **Complete Evaluator New Position Performance Planning Review**.



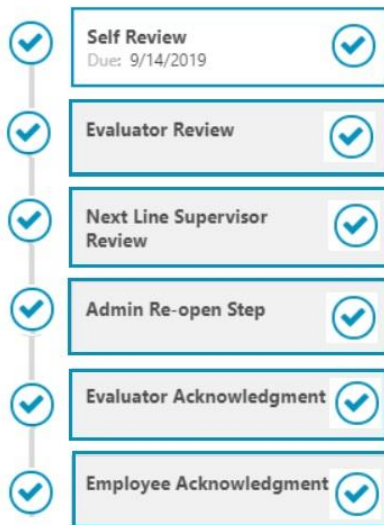
6. See the Evaluator's Annual Performance Planning section to complete an Annual Performance Plan.

\*Please note that when you reach the Goal Planning Section of the new Annual Performance Plan you must cancel the employee's current goals before assigning new goals. To cancel a goal select **Cancel Goal** beside each current task.



## Reconsideration

### Tasks Step Progression



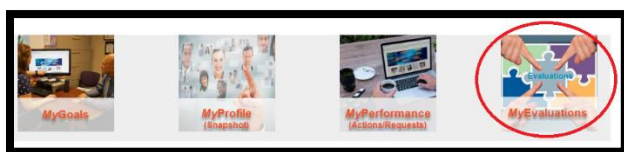
## Employee

Employees are responsible for launching the reconsideration task within five (5) working days of the Annual Performance Evaluation meeting. If the employee refused to sign the Final Performance Evaluation, they are not eligible for reconsideration.

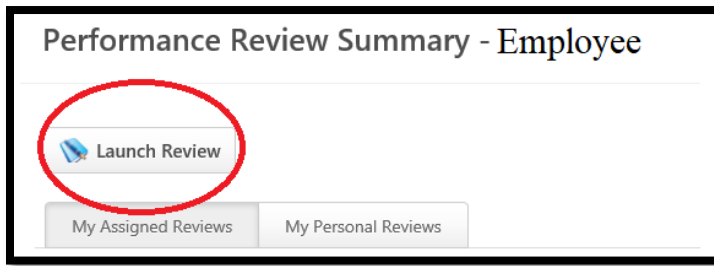
1. From the MyPURPOSE home screen, select the Performance tile.



2. Select MyEvaluations.



3. From the Performance review screen, select **Launch Review**.



4. From the Launch Performance Review screen, enter the following information and select **Launch**.

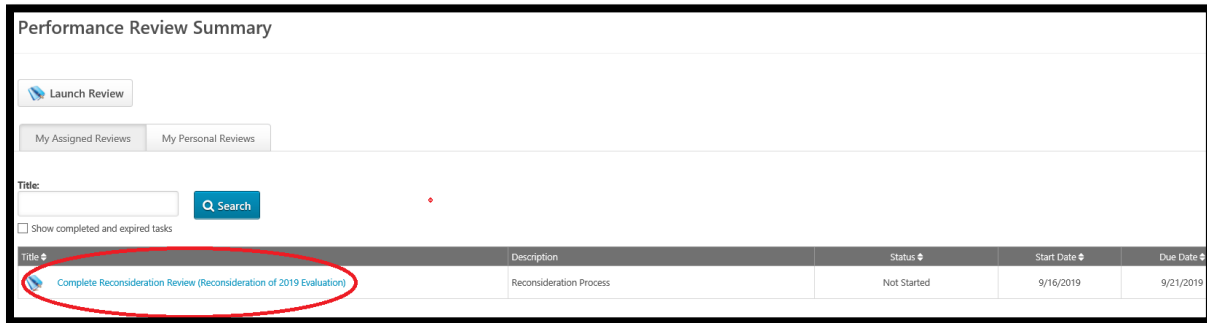
- Who is the review for? **Me**
- Which review form would you like to use? **Reconsideration Process**
- Enter title of Review. **Reconsideration of Evaluation**
- What is the Review period?

Launch Date = **Todays date**

End Date = **Thirty (30) days after launch date**

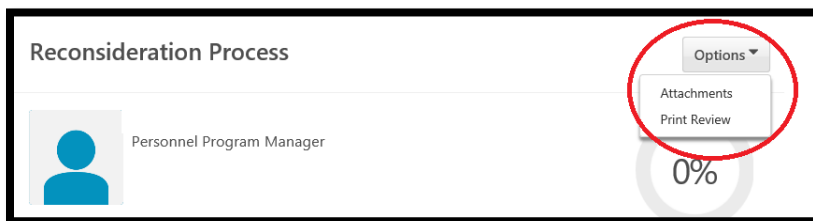
A screenshot of a web application titled "Launch Performance Review". The form contains several sections: "a. Who is this review for?" with radio buttons for "Me" (selected) and "Someone else" (with a "User" dropdown); "b. Which review form would you like to use?" with a dropdown menu showing "Reconsideration Process"; "c. Enter title of review (e.g. Reconsideration)" with a text input field; "Expiration Date:" with a "30 days" label; "d. What is the review period?" with "From:" and "To:" date pickers. Below these is a section titled "Reconsideration Process" with a "Description:" label and a "Workflow:" diagram. The workflow diagram shows a sequence of steps: "Self Review" -> "Evaluator Review" -> "Next Line Supervisor Review" -> "Admin Re-open Step" -> "Evaluator Acknowledge". At the bottom right, there are "Cancel" and "Launch" buttons, with the "Launch" button circled in red.

5. The Reconsideration Task will appear in your Performance Review Summary page or as a task in your Actions. From the Performance Review Summary page, select **Complete Reconsideration Review**.



6. On the right hand side of your screen, you will notice a dropdown labeled **Options**. Use this to attach a copy of your final evaluation.

\*See the Additional Features section to obtain a PDF of your evaluation.



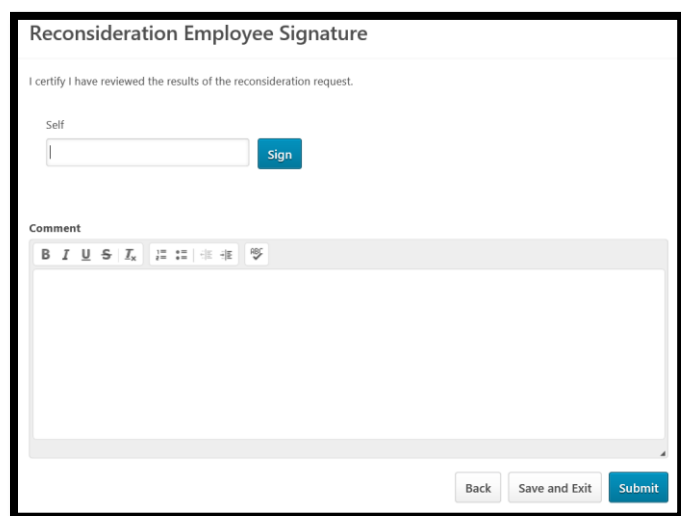
7. Each task will start with an overview, please read the Reconsideration Process overview carefully and select **Get Started**.
8. Provide detailed responses to both questions listed and select **Submit**. This will automatically follow step progression and advance the Reconsideration task to the evaluator.

### **Employee Reconsideration Acknowledgment**

- If the evaluator and/or next line supervisor decides **not** to make a change, the task will return to your action items in MyPURPOSE, select **Launch** and proceed to step one (1) below.
  - If the evaluator and/or next line supervisor accept your reconsideration, the task will return to your Action items in MyPURPOSE after your evaluator has made any necessary changes to your Final Performance Evaluation. Select **Launch**.
- Each task will start with an overview, please read the Reconsideration Process overview carefully and select **Get Started**.
  - Reconsideration Process** -Review the instructions for the employee. This section is read only, your response for both questions are visible. Select **Save and Continue**.
  - Reconsideration Evaluator Decision**- Review the instructions for the Evaluator Decision. This section is read only, your Evaluator's decision and response for both questions are visible. Select **Save and Continue**.

4. **Reconsideration Evaluator Signature**- This screen is to verify that your evaluator has reviewed the next line supervisor's decision and made any necessary changes to your Final Performance Evaluation. Select **Save and Continue**.
5. **Reconsideration Next Line Supervisor Decision**- Review the instructions for the next line supervisor Decision. This section is read only, your next line supervisor's decision and response for both questions are visible. Select **Save and Continue**.
6. **Reconsideration Next Line Supervisor Signature**- This screen is to verify that the next line supervisor reviewed the Reconsideration and provided their final decision. Select **Save and Continue**.
7. **Reconsideration Employee Signature**- This screen is to verify that you have reviewed the results of your Reconsideration request. If your Reconsideration was accepted, please view the PDF version of your updated Final Performance Evaluation to ensure changes that were agreed upon were made. Enter your name and select **Sign**. You also have the option to provide any final comments, select **Submit**.

\*See the Additional Features section to obtain a PDF of your evaluation.



*This completes the Reconsideration process.*

## **Evaluator**

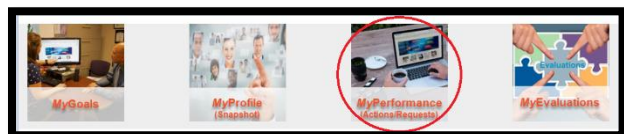
Within in five (5) working days of receiving the Reconsideration request, the evaluator shall review and respond to the request. If the evaluator does not respond within five (5) days, the employee may submit a written request to the appointing authority. The agency must respond to the request for Reconsideration and comply with 101 KAR 2:190.



1. From the MyPURPOSE home screen, select the Performance tile.



2. Select MyPerformance (Actions/Request).



3. You will have a task for each employee that requests a Reconsideration. Select **Launch** next to a Reconsideration task.



4. Each task will start with an overview, please read the Reconsideration Process overview carefully and select **Get Started**.
5. **Reconsideration Process**- Review the instructions for the evaluator/next line supervisor. This section is read only, a detailed response from the employee for both questions is visible. Select **Save and Continue**.
6. **Reconsideration Evaluator Decision**-Review the instructions for the Reconsideration Evaluator Decision. Based on the information provided by the employee, choose the **Manager Reconsideration Decision** dropdown and select your decision.
  - a. If you choose **Yes, changes WILL be made**, you have the option to include comments in the additional comments section.
  - b. If you choose **No, Changes WILL NOT be made**, you have the option to include comment in the additional comments section.

After you have selected your decision and left any necessary comments, select **Submit**. This will automatically follow step progression and advance the Reconsideration task to the next line supervisor.

\*Please note that the next line supervisor makes the final decision in the Reconsideration process.

### **Employee's Final Evaluation reopened for changes**

1. If the next line supervisor accepted the reconsideration request, they should notify the evaluator. The evaluator will contact the agency Performance Administrator to submit a business request to the Personnel

Cabinet to reopen the Final Evaluation back to your Action/Requests. Once the task is reopened, it will appear in your Actions/Requests. Select **Launch** next to the task.



- Each task will start with an overview, please read the Final Performance Evaluation overview carefully and select **Get Started**.
- Competency Section**- Review the instruction for the evaluator. Review prior comments from the employee, next line supervisor and yourself. Make any necessary changes to the rating or comments depending on the reason for the Reconsideration. Select **Save as Draft and Continue**.
- Goal Section**- Review the instruction for the evaluator. Review prior comments from the employee, next line supervisor and yourself. Make any necessary changes to the rating or comments depending on the reason for the Reconsideration. Select **Save as Draft and Continue**.
- Summary Section**- This screen provides you with the employee's overall rating, as well as a rating for the employee's competencies and goals sections, select **Submit**. The Reconsideration task will now automatically follow step progression and route back to you the evaluator for acknowledgment.

	Evaluator Rating
Competency Section	Valued Performance
Goal Section	Valued Performance
Overall	Valued Performance

## Evaluator Acknowledgment

- From your Action items select **Launch** next to the Reconsideration task.



- Each task will start with an overview, please read the Reconsideration Process overview carefully and select **Get Started**.
- Reconsideration Process** -Review the instructions for the evaluator/next line supervisor. This section is read only, the employee's response for both questions are visible, select **Next**.
- Reconsideration Evaluator Decision**- Review the instructions for the Evaluator Decision. This section is read only, your prior response for both questions are visible, select **Next**.

5. **Reconsideration Evaluator Signature**- To certify that you have reviewed the results and made any necessary changes to the employee's Final Performance Evaluation, enter your name and select **Sign** and then **Save and Continue**.
6. **Reconsideration Next Line Supervisor Signature**- This screen is to verify that the next line supervisor reviewed the Reconsideration and provided their final decision, select **Submit**. This will automatically follow step progression and route to the employee for acknowledgment.

## Next Line Supervisor

The next line supervisor shall complete their decision step no later than fifteen (15) working days after receiving the Employee's Reconsideration request.

1. From the MyPURPOSE home screen, select the Performance tile.



2. Select MyPerformance (Actions/Request).



3. You will have a task for each employee that requests a Reconsideration. Select **Launch** next to a Reconsideration task.

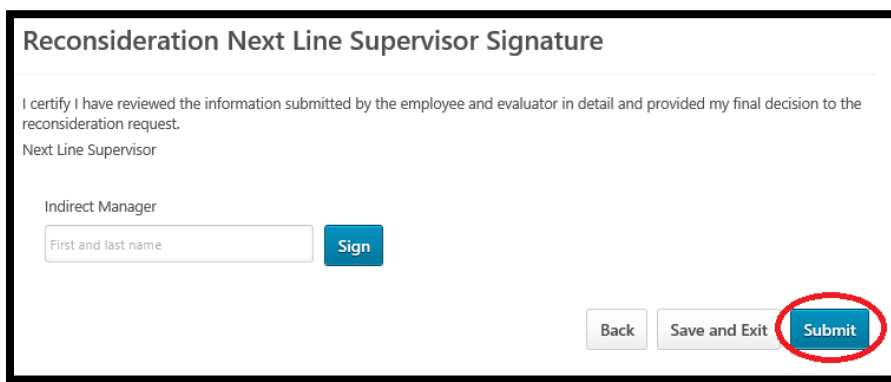


4. Each task will start with an overview, please read the Reconsideration Process overview carefully and select **Get Started**.
5. **Reconsideration Process**- Review the instructions for the evaluator/next line supervisor. This section is read only, a detailed response from the employee for both questions is visible. Select **Save and Continue**.
6. **Reconsideration Evaluator Decision**- Review the instructions for the Reconsideration Evaluator Decision. This section is read only, here you will see the Evaluator's Reconsideration Decision and any comments left by the evaluator. Select **Save and Continue**.

7. **Reconsideration Next Line Supervisor Decision**- Review the instructions for the Reconsideration Next Line Supervisor Decision. Based on the information provided by the employee and evaluator choose the **Next Line Supervisor Reconsideration Decision** dropdown and select your decision.
- If you choose **Yes, changes WILL be made**, you have the option of including comments in the additional comments section.
  - If you choose **No, Changes WILL NOT be made**, you have the option of including comment in the additional comments section.

After you have selected your decision and left any necessary comments, select **Save and Continue**. This will automatically follow step progression and advance to the next line supervisor signature.

8. **Reconsideration Next Line Supervisor Signature**- To certify that you have reviewed all information submitted and have provided your final decision to the Reconsideration request, enter your name and select **Sign** and then **Submit**. This will automatically route to the System Administrator at the Personnel Cabinet.



The screenshot shows a web form titled "Reconsideration Next Line Supervisor Signature". Below the title is a statement: "I certify I have reviewed the information submitted by the employee and evaluator in detail and provided my final decision to the reconsideration request." followed by the label "Next Line Supervisor". There is a section for "Indirect Manager" with a text input field labeled "First and last name" and a blue "Sign" button. At the bottom right, there are three buttons: "Back", "Save and Exit", and "Submit". The "Submit" button is circled in red.

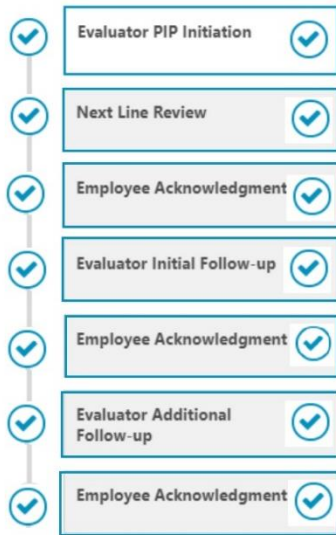
\*Please note that the next line supervisor makes the final decision in the Reconsideration process. If the next line chooses not to accept the Reconsideration request the system administrator within the Personnel Cabinet will launch the task back to the employee for acknowledgment. If the next line agrees with reconsideration request, and decides there will be a change they should contact their agency Performance Administrator. The Performance Administrator is responsible for submitting a business request to the Personnel Cabinet to reopen the Final Evaluation task back to the evaluator for changes.

## **Performance Improvement Plan**

A Performance Improvement Plan (PIP) is designed to facilitate constructive discussion between the employee and the evaluator when it may become necessary to help an employee improve performance. This is an optional process that can be used to help guide and document performance improvement. The evaluator is responsible for initiating the Performance Improvement Plan. An evaluator can initiate a Performance Improvement Plan at

any time throughout the year. A Performance Improvement Plan can also be initiated multiple times throughout the year by the evaluator if needed.

## Tasks Step Progression



## Evaluator

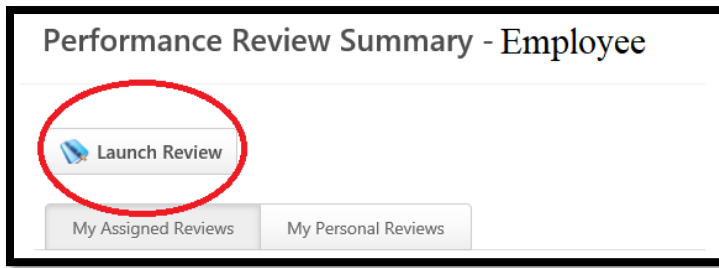
1. From the MyPURPOSE home screen, select the Performance tile.



2. Select MyEvaluations.



3. From the Performance review screen, select **Launch Review**.



4. From the Launch Performance Review screen, enter the following information and select **Launch**.
- Who is the review for? Select **Someone else**
  - Click **User**. Here you can search by employee's name, User ID or your last name. Select **Search** and choose the employee's name you wish to launch a Performance Improvement Plan.

The screenshot shows a web interface titled "Select User". Below the title, there is a search bar with the text "Search is limited to 1000 records only". Below the search bar, there are five input fields: "Last Name", "First Name", "ID", "User Name", and "Manager's Last Name". To the right of these fields is a "Search" button. Below the search bar, there is a table with the following columns: "Name", "User ID", "User Name", and "Manager". The table contains one row with the following data: "Name", "User ID", "User Name", and "Manager". The row is circled in red. Below the table, there is a link labeled "(1 Result)".

- c. Select Review Form and choose **Performance Improvement Plan**.

The screenshot shows a web interface titled "Select Review Form". Below the title, there is a search bar with the text "Review Form:". To the right of the search bar is a "Search" button. Below the search bar, there is a table with the following columns: "Review Form" and "Description". The table contains two rows: "New Position Performance Planning" and "Performance Improvement Plan". The "Performance Improvement Plan" row is circled in red.

- d. Enter a title for the review. Example: PIP for (employee name)

e. What is the Review period?

From = **Today's date**

To = **Ninety (90) days after launch date**

**Launch Performance Review**

**a.** Who is this review for? ☐ Me ☒ Someone else  **b.**

**c.** Which review form would you like to use? Performance Improvement Plan x

**d.** Performance Improvement Plan

Expiration Date: 90 days

**e.** What is the review period? From:  To:

5. The Performance Improvement Plan Task will appear in your Performance Review Summary page or as a task in your actions. From the Performance Review Summary page, select **Complete Performance Improvement Plan**.
6. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.
7. **PIP Agency HR Involvement**- Confirm that you have notified your agency HR representative and discussed the Performance Improvement Plan. Select **Save and Continue**.

**PIP Agency HR Involvement**

In order to move forward with the PIP, please confirm that you have notified your relevant Agency HR representative and please ensure continual communication with them regarding the outcome of this PIP.

Has your Agency HR Representative been notified of this PIP?

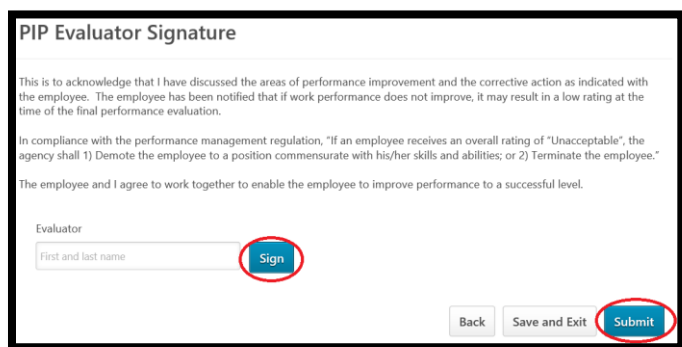
Yes

Back Save and Exit **Save and Continue**

8. **PIP Performance Improvement Areas**- Review the instructions and enter the required comment for the specific areas, which need improvement.
9. **PIP Corrective Actions**- Review the instructions and enter the required comment on how the employee can meet expectations in their position and what resources will be provided to assist the employee. Select **Save and Continue**.



10. **PIP Evaluator Signature**- This is to acknowledge that you have discussed with the employee. Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the Performance Improvement Plan to the next line supervisor.



### **Evaluator Initial Follow up**

1. After employee acknowledgment, the Performance Improvement Plan will automatically follow step progression and return to your action items as a Due Later task. This task is due thirty (30) days after the employee completed the acknowledgment step. You can make comments on the employee's progress throughout the thirty (30) days or you can wait until the step due date. If the evaluator chooses to comment throughout the thirty (30) days be sure to select **Save and Exit** and not Submit.
2. Select **Launch** to start the Initial Follow Up step in your action items in MyPURPOSE.



3. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.
4. **PIP Agency HR Involvement**- This is to confirm that you have notified your agency HR representative, select **Next**.
5. **PIP Performance Improvement Areas**- Review the instructions and your comments on specific areas that the employee needed to improve on. This section is read only, select **Save and Continue**.
6. **PIP Corrective Actions**- Review the instructions and your comments on how the employee can meet expectations in their position and what resources you committed to provide to assist the employee. This section is read only, select **Save and Continue**.
7. **PIP Outcome**- Review the instructions and enter your comments regarding the employee's performance within the last thirty (30) days. Select **Save and Continue**.

\*If you are adding comments throughout the thirty (30) days, select **Save and Exit**.



8. **PIP Evaluator Signature**- This is to acknowledge that you have discussed with the employee. Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and route to the employee.

### **Evaluator Additional Follow-up**

1. After employee acknowledgment of the initial follow up, the Performance Improvement Plan will automatically follow step progression and return to your action items as a Due Later task. This task is due thirty (30) days after the employee completed the acknowledgment step. You can make comments on the employees progress throughout the next thirty (30) days or you can wait until the step due date.
2. Select **Launch** to start to Initial Follow up step in your action items in MyPURPOSE.



3. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.
4. **PIP Agency HR Involvement**- This is to confirm that your agency HR representative has been notified, select **Next**.
5. **PIP Performance Improvement Areas**- Review the instructions and your comments on specific areas that the employee needed to improve on. This section is read only, select **Save and Continue**.
6. **PIP Corrective Actions**- Review the instructions and your comments on how the employee can meet expectations in their position and what resources you committed to provide to assist the employee. This section is read only, select **Save and Continue**.
7. **PIP Outcome**- Review the instructions and your comments regarding the employee's performance for initial follow-up. Add comments regarding the employees performance within the last thirty (30) days. Select **Save and Continue**.

\*If you are adding comments throughout the thirty (30) days, select **Save and Exit**.

8. **PIP Evaluator Signature**- This is to acknowledge that you have discussed with the employee. Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and route to the employee.

A screenshot of a web form titled 'PIP Evaluator Signature'. The form contains several paragraphs of instructional text. Below the text is a text input field labeled 'Evaluator' with the placeholder 'First and last name'. To the right of this field is a blue button labeled 'Sign', which is circled in red. At the bottom of the form, there are three buttons: 'Back', 'Save and Exit', and 'Submit'. The 'Submit' button is also circled in red.

## Next Line Supervisor

1. From the MyPURPOSE home screen, select the Performance tile.



2. Select MyPerformance (Actions/Request).



3. You will have a task for the employee who is being placed on a Performance Improvement Plan. Select **Launch** next to the task.



4. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.
5. **PIP Agency HR Involvement**- Confirm that you have notified your agency HR representative. Select **Save and Continue**.

PIP Agency HR Involvement

In order to move forward with the PIP, please confirm that you have notified your relevant Agency HR representative and please ensure continual communication with them regarding the outcome of this PIP.

Has your Agency HR Representative been notified of this PIP?

Yes

Back Save and Exit Save and Continue

6. **PIP Performance Improvement Areas**- This section is read only, comments from the evaluator on specific areas which need improvement are visible. Select **Save and Continue**.

7. **PIP Corrective Actions**- This section is read only, comments from the evaluator on how the employee can meet expectations in their position and what resources will be provided to assist the employee. **Select Save and Continue.**
8. **PIP Evaluator Signature**- This is to confirm that the evaluator has discussed with the employee. Select **Save and Continue.**
9. **PIP Next Line Supervisor Signature**- This is to acknowledge that you have reviewed the Performance Improvement Plan and agree to work together with the evaluator to enable the employee to improve their performance. Enter your name and select **Sign** then select **Submit**. This will automatically follow step progression and advance the Performance Improvement Plan to the employee.

**PIP Next Line Supervisor Signature**

This is to acknowledge that I have reviewed the areas of performance improvement and the corrective action as indicated by the evaluator. I am aware that the employee has been notified that if work performance does not improve, it may result in a low rating at the time of the final performance evaluation.

In compliance with the performance management regulation, "If an employee receives an overall rating of "Unacceptable", the agency shall 1) Demote the employee to a position commensurate with his/her skills and abilities; or 2) Terminate the employee."

The supervisor and I agree to work together to enable the employee to improve performance to a successful level.

Next Line Supervisor

First and last name

**Sign**

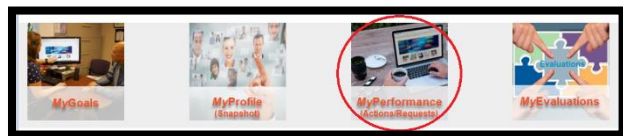
**Back** **Save and Exit** **Submit**

## Employee

1. From the MyPURPOSE home screen, select the Performance tile.



2. Select MyPerformance (Actions/Request).



3. You will have a task for your Self Review for the Performance Improvement Plan. Select **Launch** next to the task.



4. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.
5. **PIP Performance Improvement Areas**- This section is read only, comments from the evaluator on specific areas which need improvement can be viewed. Select **Save and Continue**.
6. **PIP Corrective Actions**- This section is read only, comments from the evaluator on how you can meet expectations in your position and what resources will be provided to assist. Select **Save and Continue**.
7. **PIP Employee Signature**- This is to acknowledge that you have discussed your Performance Improvement Plan with your evaluator. Enter your name and select **Sign** then select **Save and Continue**.

A screenshot of the 'PIP Employee Signature' form. The title is 'PIP Employee Signature'. Below the title, there is a paragraph of text explaining the purpose of the form. Below the text, there is a section labeled 'Self' with a text input field for 'First and last name'. To the right of the input field is a blue button labeled 'Sign'. Below the input field, there is a checkbox labeled 'Decline to sign'. At the bottom of the form, there are three buttons: 'Back', 'Save and Exit', and 'Save and Continue'. The 'Sign' button and the 'Save and Continue' button are circled in red.

\*Note, if the employee chooses to select “Decline To Sign”, the Performance Improvement Plan still remains in the employee file.

8. **PIP Evaluator Signature**- This is to confirm that your evaluator has discussed your Performance Improvement Plan with you. Select **Save and Continue**.
9. **PIP Next Line Supervisor Signature**- This is to confirm that your next line supervisor has reviewed your Performance Improvement Plan and agrees to work together with your evaluator to enable you to improve your performance. Select **Submit**. This will automatically follow step progression and route back to the evaluator for comments on the initial follow up, thirty (30) days after you have signed the Performance Improvement Plan.

### **Employee Acknowledgment to Initial Follow-up**

1. After you and your evaluator have met and discussed your Performance Improvement Plan and your progress within the last thirty (30) days, the task will return to your action items in MyPURPOSE, select **Launch**.



2. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.
3. **PIP Next Line Supervisor Signature-** This screen is to verify the next line supervisor has acknowledgment of the Performance Improvement Plan. Select **Save and Continue**.
4. **PIP Performance Improvement Areas-** Review the instructions and review comments left by your evaluator on specific areas that you need to improve on. This section is read only, select **Save and Continue**.
5. **PIP Corrective Actions-** Review the instructions and comments from your evaluator on how you can meet expectations in your position and what resources your evaluator committed to provide you. This section is read only, select **Save and Continue**.
6. **PIP Outcome-** Review the instructions and comments left by your evaluator regarding your performance within the last thirty (30) days. Select **Save and Continue**.
7. **PIP Employee Signature-** This is to acknowledge that you have discussed your performance with your Evaluator. Enter your name and select **Sign** then select **Save and Continue**.
8. **PIP Evaluator Signature-** This screen is to verify the evaluator's acknowledgment. Select **Submit**. The task will automatically follow step progression and route back to your evaluator for additional follow up in thirty (30) days

#### **Employee Acknowledgment to Additional Follow-up**

1. After you and your evaluator have met and discussed your Performance Improvement Plan and your progress within the last sixty (60) days, the task will return to your action items in MyPURPOSE, select **Launch**.
2. Each task will start with an overview, please read the Performance Improvement Plan overview carefully and select **Get Started**.
3. **PIP Next Line Supervisor Signature-** This screen is to verify the next line supervisor has acknowledgment of the Performance Improvement Plan. Select **Save and Continue**
4. **PIP Performance Improvement Areas-** Review the instructions and review comments left by your evaluator on specific areas that you need to improve on. This section is read only, select **Save and Continue**.
5. **PIP Corrective Actions-** Review the instructions and comments from your evaluator on how you can meet expectations in your position and what resources your evaluator committed to provide you. This section is read only, select **Save and Continue**.
6. **PIP Outcome-** Review the instructions and the comments left by your evaluator regarding your performance within the last sixty (60) days. Select **Save and Continue**.
7. **PIP Employee Signature-** This is to acknowledge that you have discussed your performance with your evaluator. Enter your name and select **Sign** then select **Save and Continue**.
8. **PIP Evaluator Signature-** This screen is to verify the evaluator's acknowledgment. Select **Submit**.

## Exporting your Evaluation to PDF

Follow the steps below to obtain a PDF version of your evaluation.

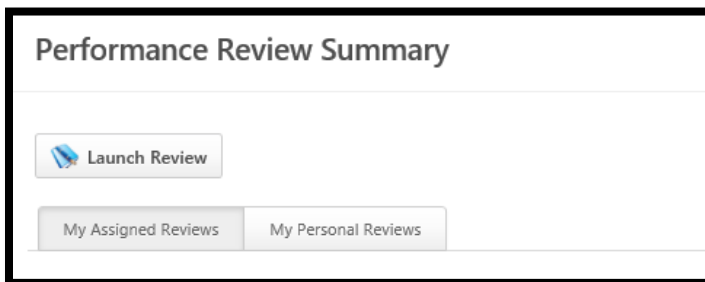
1. From the MyPURPOSE home screen, select the Performance tile.



2. Select MyEvaluations.



3. Within your Performance Review Summary page select **My Personal Reviews**.

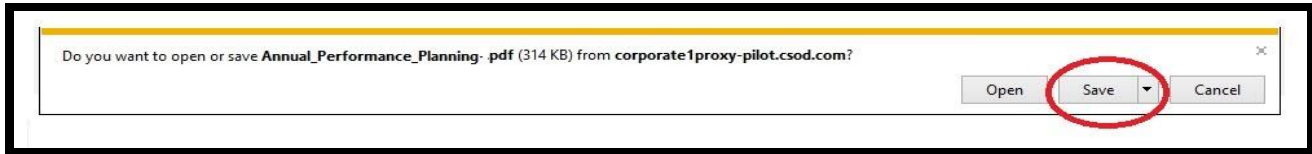


Select the portion of your evaluation you wish to save in PDF and/or print.

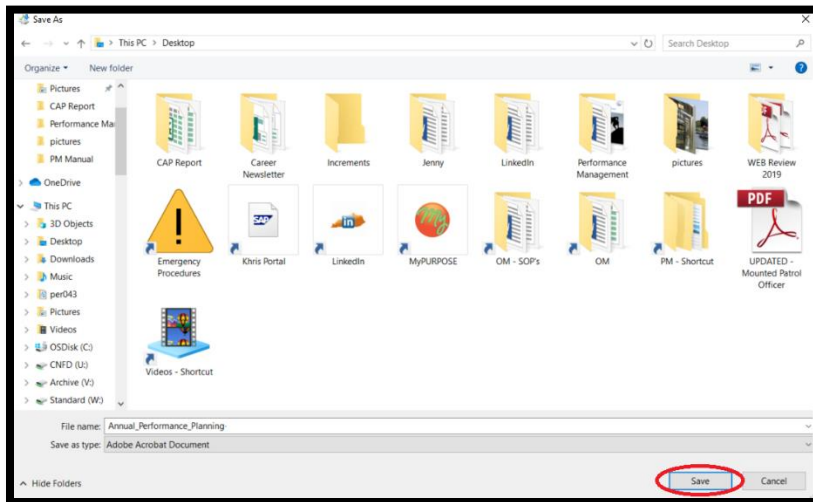
Review	Review Period	Start Date	Completion Date	Task Status	Rating	Attachments
Annual Performance Planning	8/20/2019 - 12/31/2019	8/20/2019	8/21/2019	Complete	N/A	
Mid-Year Interim	8/21/2019 - 12/31/2019	8/21/2019	8/21/2019	Complete	N/A	
PIP for (Performance Improvement Plan)	10/7/2019 - 12/4/2019	10/7/2019	N/A	In Progress	---	
Year-End Interim/Final Performance Evaluation	8/22/2019 - 12/31/2019	8/22/2019	8/22/2019	Complete	Distinguished Performance	

(4 Results)

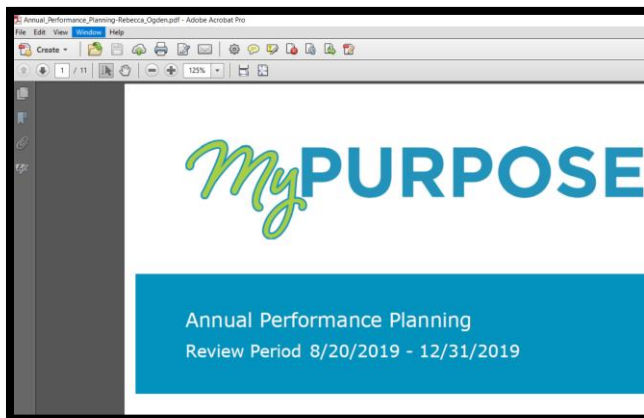
4. At the bottom of your screen you will see a pop up asking you if you would like to save or open. Select the dropdown next to **Save** and select **Save As**.



5. Choose the location on your computer to save the document and select **Save**.



6. Retrieve the PDF document from its saved location. You can now print the PDF document if needed.





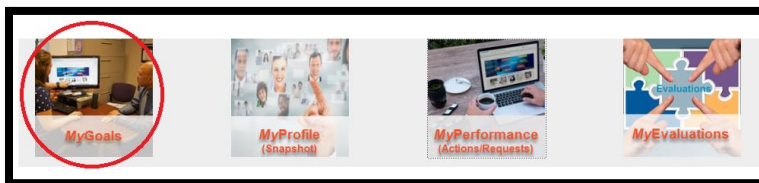
## Assigning Goals and Tasks to multiple team members

If you have multiple employees that report to you who will have the same goals and tasks, follow these steps to assign goals to them within their Annual Performance Plan.

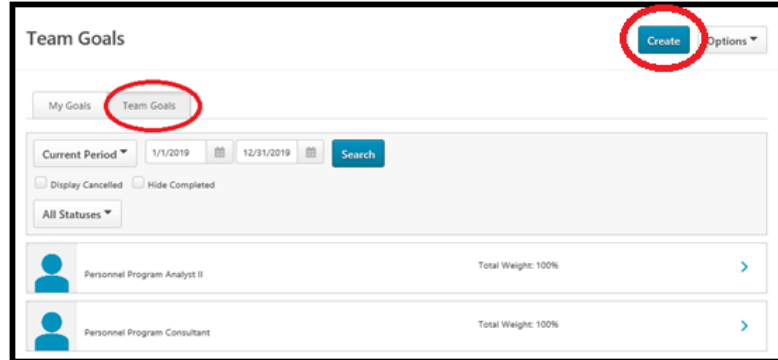
1. From the MyPURPOSE home screen, select the Performance tile.



2. Select MyGoals.



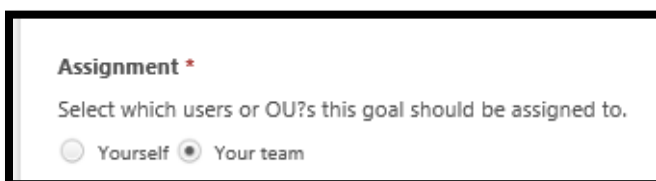
3. From the MyGoals page, select **Team Goals** then **Create**.



4. Create the goal and assign 1-3 tasks.

\*See the Evaluator's Annual Performance Planning section to create goals.

5. At the bottom of the Create Goals page under assignment, select **Your Team**.








6. A list of all your employees who report to you will appear. Please select each employee(s) you would like to assign the goal to and select **Submit**.

**Assignment \***  
Select which users or OU's this goal should be assigned to.

☐ Yourself ☒ Your team

<input type="checkbox"/>	Name	Title	Direct and Indirect Reports
<input checked="" type="checkbox"/>		Personnel Program Manager	
<input type="checkbox"/>		Personnel Program Analyst II	
<input checked="" type="checkbox"/>		Personnel Program Consultant	

Once the Annual Performance Plan is launched, MyPURPOSE will automatically populate the goals and tasks in the plan for the employees you selected.

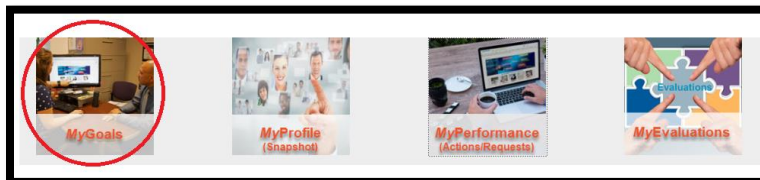
## Continued Goal Modification

The evaluator and the employee has the ability to leave comments throughout the year on goals.

1. From the MyPURPOSE home screen, select the Performance tile.




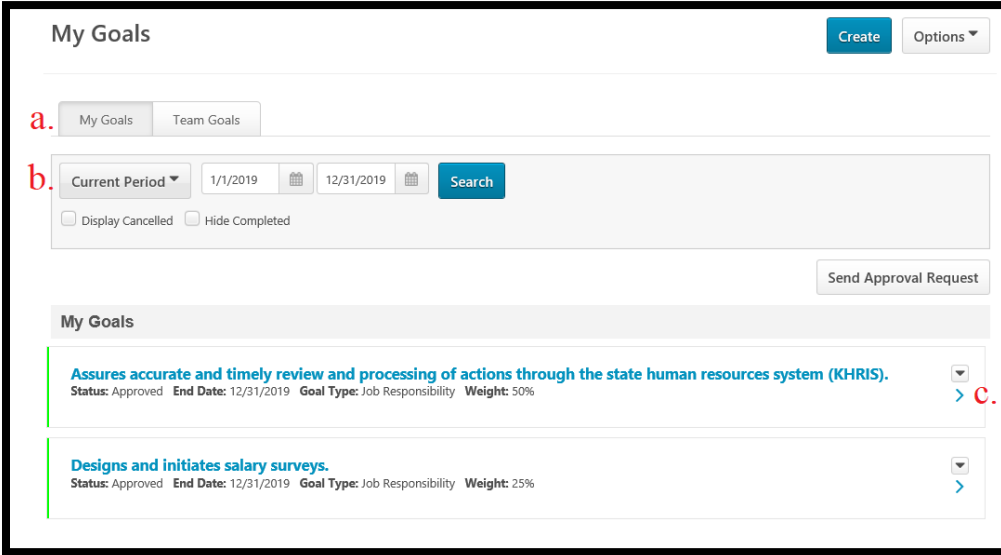
2. Select MyGoals.



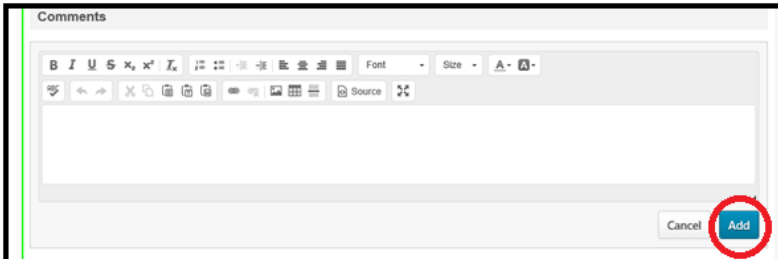
3. To add a comment:

**Employee:**


- a. From the My Goals page select the **My Goals** tab.
- b. Validate the review period.
- c. Select the radio button  beside the goal you wish to comment on to expand the goal description and tasks.

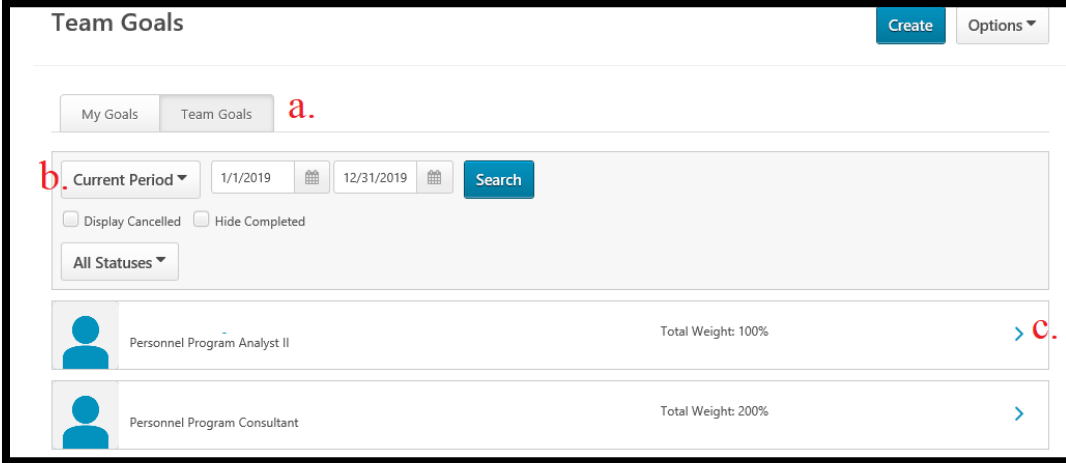



- d. Select **Add Comment** and provide a comment that pertains to the selected goal within the comment box, select **Add**.

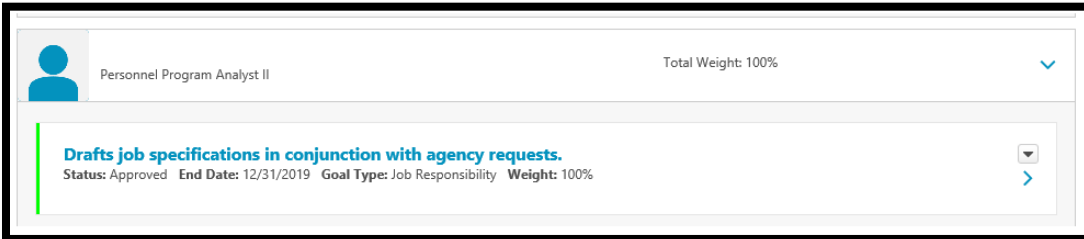


## Evaluator:

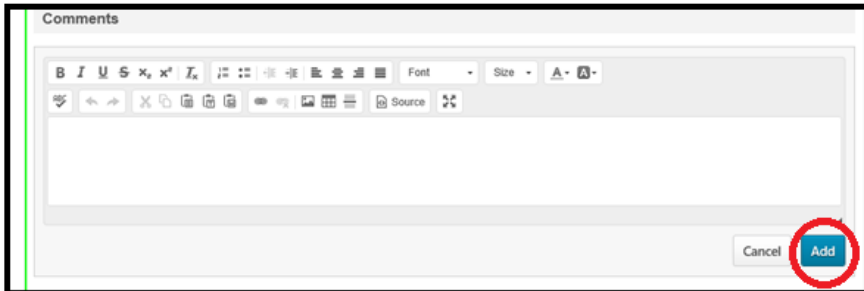
- From the My Goals Page select the **Team Goals** tab.
- Validate the review period.
- To view the goals associated with the employee select the radio button  next to the employee.



- Select the radio button  next to the goal you wish to comment on.




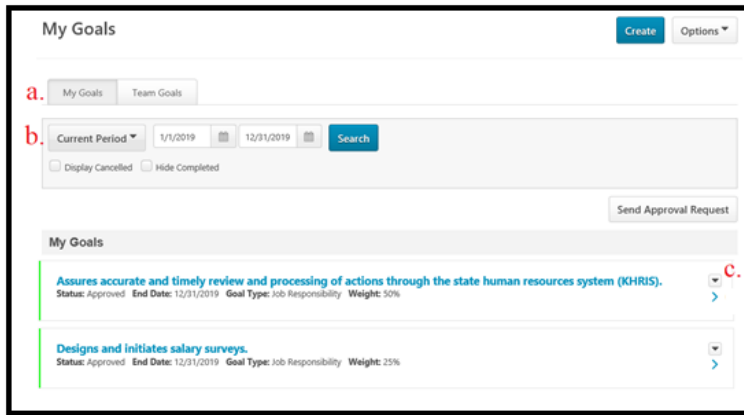
- Select **Add Comment** and provide a comment that pertains to the selected goal within the comment box. Select **Add**.



4. To modify an existing goal:


**Employee:**

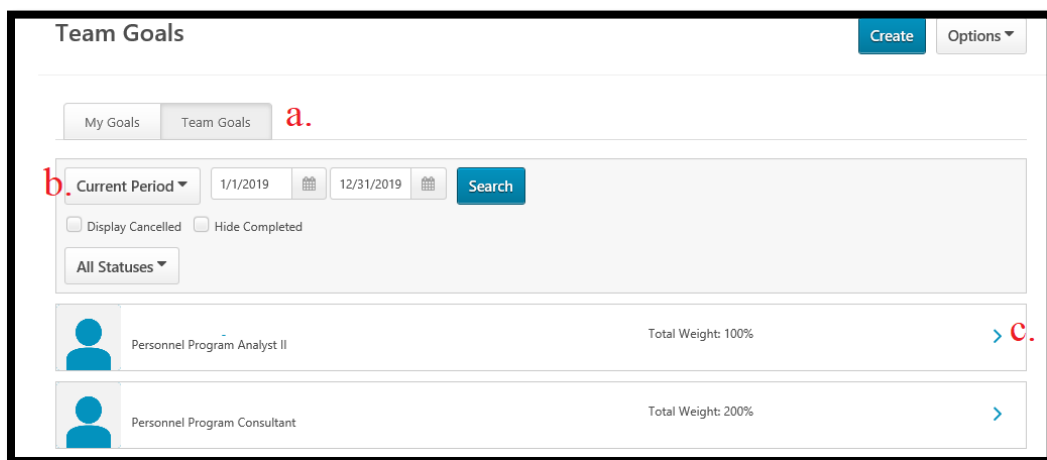
- a. From the My Goals select the **My Goals** tab.
- b. Validate the review period.
- c. Select the drop down  option beside the goal you wish to modify and select **Edit**.




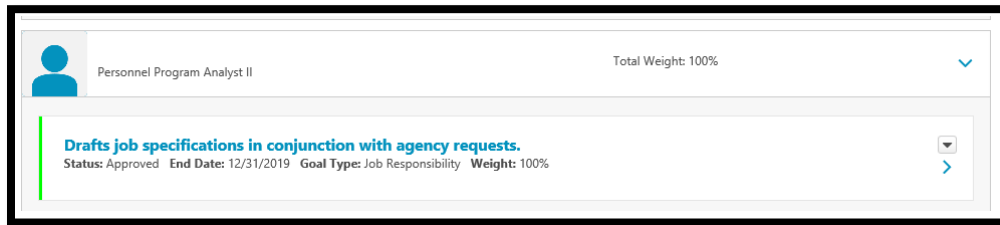
- d. Make any edits to the goal and select **Submit**. The edit will automatically route and send an e-mail notification to your evaluator for approval.

**Evaluator:**

- a. From the My Goals Page select the **Team Goals** tab.
- b. Validate the review period.
- c. To view the goals associated with the employee select the radio button  next to the employee.



- d. Select the drop down  option beside the goal you wish to modify and select **Edit**.

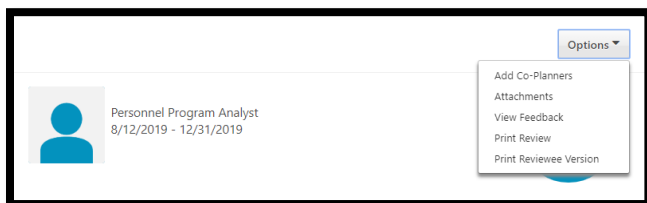


- e. Make any edits to the goal and select **Submit**. An e-mail notification will be sent to the employee to notify them that a goal has been modified.
- f. The evaluator should notify the employee of changes to their goals and request that they visit the MyGOALS page to review and comment to acknowledge the change.

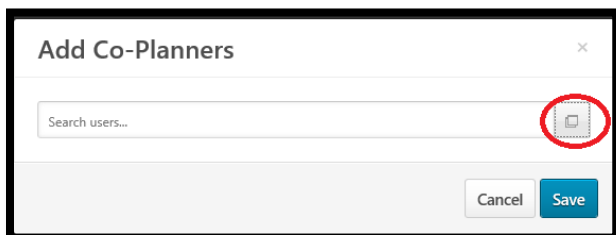
## Adding a Co-Planner

The evaluator should be the one to submit tasks during the Annual Performance Planning, Mid-Year Interim Review or the Year-End Interim/Final Performance Evaluation. However, the evaluator has the option to add a Co-Planner to an employee's review if deemed necessary. If a Co-Planner is added, it is important to note that both the evaluator and the Co-Planner will see all assigned tasks for the employee. Communication is necessary so that both individuals are not attempting to complete the same task for an employee.

1. To add a Co-Planner select the dropdown labeled **Options** on the right hand side of your screen and select **Add Co-Planners**.



2. Select the search icon to select a co-planner.



3. Enter the Co-Planners name into the search field and key enter.

Select a user

Please search for a user by entering keywords using any of the following criteria: name, position, division, location, or manager's name.

Sally

Full Name	Title	Manager
Sally	Commissioner - With Increment Date	
Sally	Environmental Control Manager	
Sally		
Sally	Administrative Assistant -UG	
Sally	Project Center Manager -LRC	

1 2 3 4 5 > >>

1 to 5 of 201

4. Select on the Co-Planners name and select **SAVE**.

Add Co-Planners

Sally Smith

Cancel Save

*You have now successfully added a co-planner.*

## Copying/Advancing Goals From One Review Period To The Next

It is always best practice to review and update an employee's goals each review period. However, there are times when an employee's goal(s) could remain the same from one review period to the next. Follow the steps below to copy or advance employee goals to the new review period.

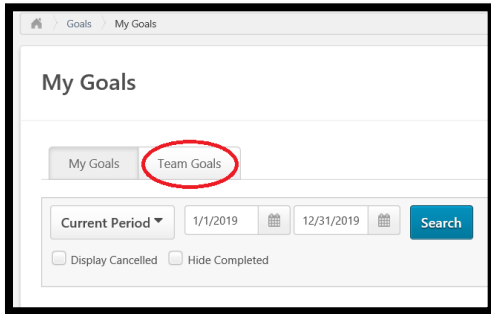
1. From the MyPURPOSE home screen, select the Performance tile.



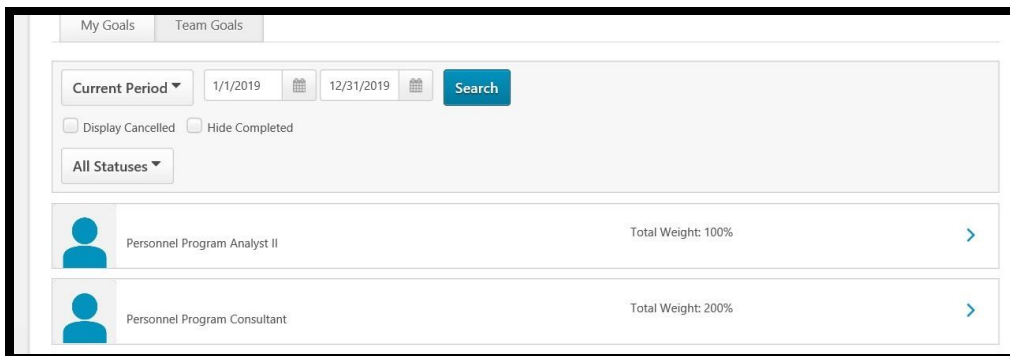
2. Select MyGoals.



3. From the MyGoals page, select **Team Goals**.

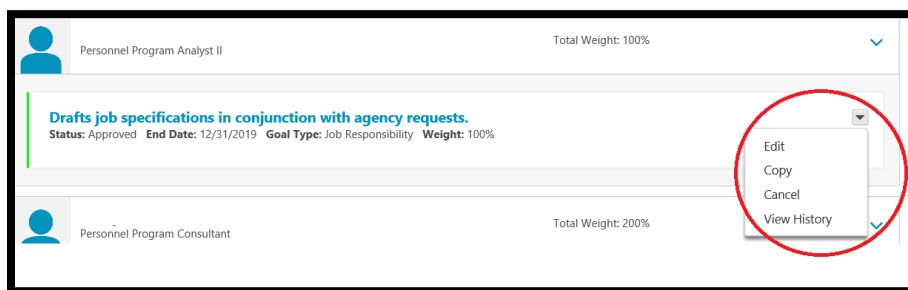


4. Validate the review period and select the radio button > next to the employee whose goals you would like to copy/advance.

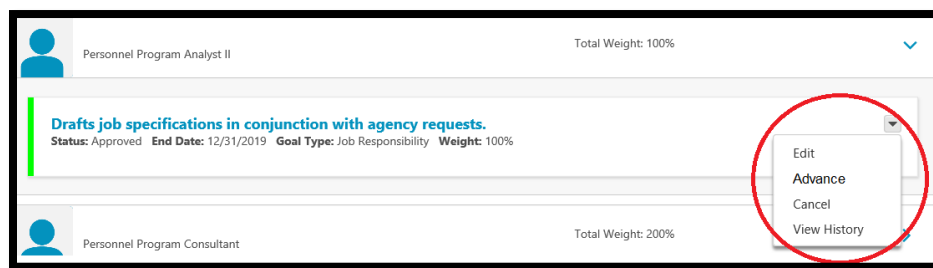


Select the drop down ▼ next to the goal you wish to copy/advance to the next Annual Performance Plan.

- a. If you are copying/advancing goals prior to December 31<sup>st</sup>, select **Copy**.



- b. If you are copying/advancing goals after January 1<sup>st</sup>, select **Advance**.



5. On the Create Goals page update the start and end date with the appropriate review period.
6. If necessary, make change to the goal and/or tasks associated with the goal, select **Submit**.

A screenshot of the 'Create Goals' form. The form has a header 'Create Goals' and a sub-header 'Enter details or import using the Library.' Below this is a red note: 'All fields marked "\*" are required'. The form fields include: 'Title \*' with the value 'Drafts job specifications in conjunction with agency requests.'; 'Description' with a rich text editor containing the same text; and a table at the bottom with three columns: 'Start Date', 'End Date \*', and 'Weight \*'. The 'Start Date' field contains '1/1/2019', the 'End Date' field contains '12/31/2019', and the 'Weight' field contains '100'. These three fields are circled in red.

*\*You have successfully copied/advanced the employee's goal to the next Annual Performance Planning Review Period. Once the new Annual Performance Plan is launched, any goal that you have copied/advanced will prepopulate on the employee's Annual Performance Plan.*